

NORTHBROOK PUBLIC LIBRARY IN-PERSON/VIRTUAL MEETING

April 20, 2023 | 7:30 p.m.
Northbrook Public Library | Civic Room

https://youtu.be/_Stfc4JISfY

Regular Monthly Meeting Agenda

- 1 Call Regular Meeting to Order – Mr. Jay Glaubinger
- 2 Board of Trustees Roll Call – Ms. Jennifer McGee
- 3 Consent Agenda – Mr. Jay Glaubinger
 - 3.1 Approval of the Agenda
 - 3.2 Approve Regular Session Minutes – March 16, 2023
 - 3.3 Approve Cash Balances & Income Statement March 2023
 - 3.4 Approve Bills and Charges from March 2023 in the amount of \$846,038.65
 - 3.5 Rescind Mandatory COVID Vaccine Mandate
 - 3.6 Approve FY24 Meeting Dates
- 4 Public Comments
- 5 Staff Reports – Ms. Kate Hall
 - 5.1 One Book One Northbrook Presentation - Phil Collins
 - 5.2 EDI Committee update - Michelle Mistalski & Susan Wolf
- 6 Board Member Reports
 - 6.1 Board Officer Nominating Committee Update
- 7 Unfinished Business
 - 7.1 Zheng Consulting Comprehensive DEI Assessment and Strategy Proposal
 - 7.2 Decennial Committees on Local Government Efficiency Act
 - 7.3 Strategic Plan RFP Review
- 8 New Business
 - 8.1 Transfer of Funds to Debt Service & CIF
 - 8.2 Executive Director Performance Review
- 9 Closed Session

pursuant to 5 ILCS 120/2(c)1: the appointment, employment, compensation, discipline, performance, or dismissal of specific employees of the public body or legal counsel for the public body including hearing testimony on a complaint lodged against an employee of the public body or against legal counsel for the public body to determine its validity.
- 10 Agenda Building
- 11 Adjourn

Community members wishing to respectfully share thoughts about any matter concerning the Northbrook Public Library may do so during Public Comments as outlined in the [Public Comment Policy](#). The Board will not immediately respond to public comments or engage in open dialogue due to time constraints, but we are of course actively listening to your thoughts, comments, and suggestions. If follow-up communication is necessary, a staff member will contact you following the meeting. Thank you for your understanding of these guidelines.

FINAL VOTE OR ACTION MAY BE TAKEN AT THE MEETING ON ANY AGENDA ITEM SUBJECT MATTER LISTED ABOVE, UNLESS THE AGENDA LINE ITEM SPECIFICALLY STATES OTHERWISE.

The Northbrook Public Library is subject to the Requirements of the Americans with Disabilities Act of 1990. Individuals with disabilities who plan to attend any meetings of the Board and who require certain accommodations in order to allow them to observe and/or participate in this meeting, or who have questions regarding the accessibility of these meetings or the facilities are requested contact 847-272-7074 promptly to allow the Northbrook Public Library to make reasonable accommodations for those persons. Hearing impaired individuals may establish TDD contact by calling 847-272-7074.

**NORTHBROOK PUBLIC LIBRARY
CASH BALANCES
3/31/2023**

	Beginning Balance	Cash Receipts	Expenditures	Ending Balance
Operating				
General	6,850,661.99	2,622,171.10	660,169.07	8,812,664.02
Restricted	406,424.15	84,353.89	10,687.57	480,090.47
IMRF	698,022.25	115,708.99	26,670.52	787,060.72
Fica	109,718.35	78,682.12	25,631.51	162,768.96
Total Operating	<u>\$ 8,064,826.74</u>	<u>\$2,900,916.10</u>	<u>\$ 723,158.67</u>	<u>\$10,242,584.17</u>
Capital Improvement	\$ 4,950,840.45	\$ 6,172.99	\$ 122,880.00	\$ 4,834,133.44
Debt Service	\$ 395.16			\$ 395.16

Cash Detail	Operating	Capital Improvement	Debt Service
NB&T - Checking	(84,681.30)	(85,314.27)	395.16
PayPal	549.81	-	-
FBofHP	229,067.32	-	-
Fifth Third - Checking/Money Market	10,096,495.49	4,918,922.24	-
US Bancorp	677.85	525.47	-
Petty Cash	475.00	-	-
Total	<u>\$ 10,242,584.17</u>	<u>\$4,834,133.44</u>	<u>\$ 395.16</u>

NB&T = Northbrook Bank & Trust
 FBofHP - First Bank of Highland Park
 USB = US Bancorp

Northbrook Public Library

Income Statement

3/31/23

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	91.67
01 - General Operating Fund						
Revenues						
Undesignated Revenue						
Property Tax Levy	(\$1,661.95)	(\$1,834.75)	\$7,244,763.58	\$7,495,582.94	\$7,491,000.00	100.06%
Replacement Tax	\$0.00	\$194,677.72	\$215,247.98	\$371,180.73	\$125,000.00	296.94%
Impact Fees	\$4,583.85	\$0.00	\$11,218.71	\$5,525.32	\$0.00	0.00%
Fines, Fees & Rentals	\$2,647.62	\$3,715.03	\$30,436.58	\$35,893.03	\$25,000.00	143.57%
Interest Income	\$271.15	\$4,367.53	\$3,906.26	\$26,521.30	\$5,000.00	530.43%
Other Income	\$1,164.85	\$51.00	\$42,355.13	\$27,492.71	\$100,000.00	27.49%
Total Undesignated Revenue	\$7,005.52	\$200,976.53	\$7,547,928.24	\$7,962,196.03	\$7,746,000.00	102.79%
Designated Revenue						
Gifts & Other Designated Income	\$39,958.42	\$83,665.67	\$148,334.48	\$427,225.04	\$200,000.00	213.61%
Designated Interest Income	\$61.02	\$688.22	\$217.21	\$2,695.38	\$0.00	0.00%
Total Designated Revenue	\$40,019.44	\$84,353.89	\$148,551.69	\$429,920.42	\$200,000.00	214.96%
Total Revenues	\$47,024.96	\$285,330.42	\$7,696,479.93	\$8,392,116.45	\$7,946,000.00	105.61%
Expenses						
Undesignated Expenses						
Materials & Services						
Books	\$59,101.40	\$67,178.38	\$760,938.23	\$804,760.69	\$932,000.00	86.35%
Audio Visual	\$50,031.61	\$57,038.01	\$658,235.56	\$705,191.23		
Videos/DVDs	\$4,409.61	\$3,766.21	\$40,979.17	\$45,400.59		
Programs	\$9,530.48	\$9,484.90	\$69,503.72	\$64,245.25	\$94,000.00	68.35%
OCLC	\$58.00	\$31.04	\$21,958.76	\$23,481.90	\$22,000.00	106.74%
CCS Shared Costs	\$0.00	\$0.00	\$72,444.45	\$71,901.69	\$80,000.00	89.88%
Total Materials & Services	\$68,689.88	\$76,694.32	\$924,845.16	\$964,389.53	\$1,128,000.00	85.50%
Human Resources						
General Salaries and Wages	\$320,190.27	\$353,672.08	\$3,241,876.05	\$3,580,814.46	\$4,004,000.00	89.43%
Maintenance Salaries & Wages	\$13,893.42	\$16,193.69	\$136,814.50	\$157,358.86	\$178,500.00	88.16%
Group Insurance	\$53,695.84	\$56,534.89	\$600,808.44	\$617,539.85	\$730,000.00	84.59%
Unemployment/Worker's Comp	\$0.00	\$2,636.76	\$19,436.67	\$24,264.71	\$27,000.00	89.87%
Staff Development	\$3,185.88	\$8,382.39	\$45,951.92	\$50,437.72	\$60,000.00	84.06%
Total Human Resources	\$390,965.41	\$437,419.81	\$4,044,887.58	\$4,430,415.60	\$4,999,500.00	88.62%

Northbrook Public Library
Income Statement
3/31/23

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	91.67
01 - General Operating Fund						
Operating Costs						
Photocopy	\$1,394.43	\$1,256.96	\$25,137.36	\$24,698.87	\$30,000.00	82.33%
Office & Library Supplies	\$8,510.56	\$6,954.51	\$44,964.30	\$54,924.83	\$70,000.00	78.46%
Software	\$7,326.54	\$13,223.93	\$83,156.30	\$83,399.31	\$98,000.00	85.10%
Postage	\$2.32	\$464.47	\$18,501.79	\$18,041.65	\$20,000.00	90.21%
General Insurance	\$0.00	\$6,108.75	\$63,502.25	\$71,157.94	\$68,000.00	104.64%
Telephone/Internet	\$6.00	\$33.74	\$34,621.58	\$29,925.08	\$39,000.00	76.73%
Professional Services	\$38,271.28	\$26,920.28	\$256,850.36	\$300,095.67	\$322,000.00	93.20%
Furniture, Equipment	\$0.00	\$2,241.00	\$48,123.02	\$44,697.48	\$50,000.00	89.40%
Equipment Rental & Maintenance	\$189.00	\$7,815.34	\$23,059.72	\$46,051.14	\$42,000.00	109.65%
Community Relations	\$1,434.15	\$1,622.83	\$33,263.37	\$37,008.85	\$51,000.00	72.57%
Total Operating Costs	\$57,134.28	\$66,641.81	\$631,180.05	\$710,000.82	\$790,000.00	89.87%
Maintenance						
Vehicle Expense	\$0.00	\$0.00	\$300.93	\$737.69	\$3,000.00	24.59%
Janitorial Supplies	\$4,514.13	\$4,896.62	\$36,677.10	\$37,848.77	\$45,000.00	84.11%
Utilities	\$5,400.03	\$4,732.82	\$40,615.39	\$42,231.30	\$53,000.00	79.68%
Building Repairs	\$18,591.00	\$0.00	\$39,081.72	\$37,706.63	\$30,000.00	125.69%
Contracted Services	(\$5,218.12)	\$9,475.19	\$132,098.84	\$130,807.66	\$146,000.00	89.59%
Total Maintenance	\$23,287.04	\$19,104.63	\$248,773.98	\$249,332.05	\$277,000.00	90.01%
Other Expenses						
Recruiting	\$45.00	\$0.00	\$1,554.50	\$420.00	\$1,000.00	42.00%
Contingency & Misc Exp	\$504.55	\$799.26	\$6,107.09	\$8,352.21	\$100,000.00	8.35%
Board Development	\$0.00	\$326.75	\$480.20	\$522.86	\$500.00	104.57%
Total Other Expenses	\$549.55	\$1,126.01	\$8,141.79	\$9,295.07	\$101,500.00	9.16%
Total Undesignated Expenses	\$540,626.16	\$600,986.58	\$5,857,828.56	\$6,363,433.07	\$7,296,000.00	87.22%
Designated Expenses						
Miscellaneous Designated Expenses	(\$3,431.36)	\$3,976.06	\$20,995.24	\$226,167.10	\$200,000.00	113.08%
Designated Materials Expense	\$118.44	\$0.00	\$1,319.64	\$1,533.40	\$0.00	0.00%
Designated Capital Expense	\$12,857.00	\$0.00	\$17,599.00	\$363.76	\$0.00	0.00%
Designated Program Expense	\$700.00	\$6,711.48	\$52,652.43	\$64,161.64	\$0.00	0.00%
Total Designated Expenses	\$10,244.08	\$10,687.54	\$92,566.31	\$292,225.90	\$200,000.00	146.11%
Transfers & Other Financing Uses						
Net Loss on Investment	\$0.00	\$0.00	(\$221.73)	\$0.00	\$0.00	0.00%
Transfer to CIF	\$0.00	\$0.00	\$0.00	\$0.00	\$425,000.00	0.00%
Transfer to Debt Service	\$0.00	\$0.00	\$0.00	\$0.00	\$25,000.00	0.00%
Total Transfers & Other Financing Uses	\$0.00	\$0.00	(\$221.73)	\$0.00	\$450,000.00	0.00%
Total Expenses	\$550,870.24	\$611,674.12	\$5,950,173.14	\$6,655,658.97	\$7,946,000.00	83.76%
NET SURPLUS/(DEFICIT)	(\$503,845.28)	(\$326,343.70)	\$1,746,306.79	\$1,736,457.48	\$0.00	

Northbrook Public Library
Income Statement
3/31/23

02 - IMRF/FICA Fund	PY Month	CY Month	PY YTD	CY YTD	CY Budget	91.67
Revenues						
Undesignated Revenue						
Property Tax Levy-IMRF	(\$89.36)	(\$102.05)	\$389,545.92	\$416,911.75	\$425,000.00	98.10%
Property Tax Levy FICA	(\$64.56)	(\$69.39)	\$281,446.93	\$283,500.00	\$289,000.00	98.10%
Interest Income IMRF	\$0.00	\$23.64	\$2.13	\$61.56	\$50.00	123.12%
Interest Income FICA	\$0.00	\$16.08	\$1.55	\$41.86	\$50.00	83.72%
Total Undesignated Revenue	(\$153.92)	(\$131.72)	\$670,996.53	\$700,515.17	\$714,100.00	98.10%
Total Revenues	(\$153.92)	(\$131.72)	\$670,996.53	\$700,515.17	\$714,100.00	98.10%
Expenses						
Undesignated Expenses						
Human Resources						
Employer IMRF	\$29,543.05	\$26,670.52	\$333,385.41	\$314,465.86	\$425,000.00	73.99%
Employer FICA	\$24,559.30	\$25,631.51	\$248,417.79	\$277,324.60	\$289,000.00	95.96%
Total Human Resources	\$54,102.35	\$52,302.03	\$581,803.20	\$591,790.46	\$714,000.00	82.88%
Total Undesignated Expenses	\$54,102.35	\$52,302.03	\$581,803.20	\$591,790.46	\$714,000.00	82.88%
Total Expenses	\$54,102.35	\$52,302.03	\$581,803.20	\$591,790.46	\$714,000.00	82.88%
NET SURPLUS/(DEFICIT)	(\$54,256.27)	(\$52,433.75)	\$89,193.33	\$108,724.71	\$100.00	

Northbrook Public Library
Income Statement
3/31/23

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	91.67
03 - Capital Improvements Fund						
Revenues						
Undesignated Revenue						
Interest Income	\$214.45	\$2,707.99	\$3,176.28	\$19,580.49	\$10,000.00	195.80%
Other Income	\$0.00	\$0.00	\$7,200.00	\$0.00	\$0.00	0.00%
Total Undesignated Revenue	\$214.45	\$2,707.99	\$10,376.28	\$19,580.49	\$10,000.00	195.80%
Transfers & Other Financing Sources						
Transfer from General fund	\$0.00	\$0.00	\$0.00	\$0.00	\$425,000.00	0.00%
Insurance Proceeds	\$0.00	\$3,465.00	\$0.00	\$25,893.00	\$0.00	0.00%
Total Transfers & Other Financing Sources	\$0.00	\$3,465.00	\$0.00	\$25,893.00	\$425,000.00	6.09%
Total Revenues	\$214.45	\$6,172.99	\$10,376.28	\$45,473.49	\$435,000.00	10.45%
Expenses						
Undesignated Expenses						
Capital Projects & Bond Expenses						
Renovation/Repair	\$2,080.00	\$122,880.00	\$115,562.00	\$205,129.90	\$540,725.00	37.94%
Professional Fees	\$787.50	\$0.00	\$36,530.00	\$16,077.50	\$75,525.00	21.29%
Furniture & Equipment	\$0.00	\$0.00	\$261,730.06	\$0.00	\$189,000.00	0.00%
Total Capital & Bond Expenses	\$2,867.50	\$122,880.00	\$413,822.06	\$221,207.40	\$805,250.00	27.47%
Total Undesignated Expenses	\$2,867.50	\$122,880.00	\$413,822.06	\$221,207.40	\$805,250.00	27.47%
Total Expenses	\$2,867.50	\$122,880.00	\$413,822.06	\$221,207.40	\$805,250.00	27.47%
NET SURPLUS/(DEFICIT)	(\$2,653.05)	(\$116,707.01)	(\$403,445.78)	(\$175,733.91)	(\$370,250.00)	

Northbrook Public Library
Income Statement
3/31/23

	PY Month	CY Month	PY YTD	CY YTD	CY Budget	91.67
05 - Debt Service Fund						
Revenues						
Undesignated Revenue						
Property Tax Levy	(\$169.40)	(\$181.90)	\$738,432.02	\$743,132.97	\$757,550.00	98.10%
Interest Income	\$0.00	\$42.14	\$4.04	\$658.69	\$0.00	0.00%
Total Undesignated Revenue	(\$169.40)	(\$139.76)	\$738,436.06	\$743,791.66	\$757,550.00	98.18%
Total Revenues	(\$169.40)	(\$139.76)	\$738,436.06	\$743,791.66	\$757,550.00	98.18%
Expenses						
Undesignated Expenses						
Capital Projects & Bond Expenses						
Interest Payments	\$0.00	\$0.00	\$382,171.54	\$367,550.00	\$367,550.00	100.00%
Principal Payments	\$0.00	\$0.00	\$376,077.00	\$390,000.00	\$390,000.00	100.00%
Total Capital & Bond Expenses	\$0.00	\$0.00	\$758,248.54	\$757,550.00	\$757,550.00	100.00%
Total Undesignated Expenses	\$0.00	\$0.00	\$758,248.54	\$757,550.00	\$757,550.00	100.00%
Transfers & Other Financing Uses						
Net Loss on Investment	\$0.00	\$0.00	(\$12.96)	\$0.00	\$0.00	0.00%
Total Transfers & Other Financing Uses	\$0.00	\$0.00	(\$12.96)	\$0.00	\$0.00	0.00%
Total Expenses	\$0.00	\$0.00	\$758,235.58	\$757,550.00	\$757,550.00	100.00%
NET SURPLUS/(DEFICIT)	(\$169.40)	(\$139.76)	(\$19,799.52)	(\$13,758.34)	\$0.00	

March 2023 Financial Summary

I want to highlight that the budget is allocated evenly throughout the year while actual expenditures are recorded on a cash basis as paid.

Total General Fund revenues collected to date is \$8,392,116

- 98.10% of property taxes have been collected. The budget number includes the uncollectible allowance.

	Budget	Actual	Percentage
Property Taxes Collected	\$7,641,000	\$7,495,853	98.10%
Property Tax Allowance	(\$150,000)		
Total per Income Statement	\$7,491,000	\$7,495,583	100.06%

- Replacement Tax – budget number is a conservative estimate - Allocations are higher due to legislative changes that increase the allocation. This revenue is collected by the State of Illinois and paid to local governments to replace money that was lost by local governments when their powers to impose personal property taxes on corporations, partnerships, and other business entities were taken away.
- Fines, Fees & Rentals budget is a conservative estimate – we have collected more than budget – the breakdown is as follows
 - 16% is fines and lost item / replacement collections
 - 62% is non-resident fees
 - 22% is copy machine collections

Total General Fund expenditures are \$6,655,659 budget differences include:

- Programs is less than budget due to change in program philosophy
- OCLC – is over budget – the actual number is comprised of OCLC JED Profile Group Pricing which is billed quarterly, ILL charges from Illinois Heartland and MARC records charges from Overdrive for eBooks
 - OCLC JED Profile Group Pricing \$21,254.90 – billed for 12 months
 - ILL charges from Illinois Heartland \$ 432.77 – billed for 9 months
 - MARC records charges from Overdrive \$ 1,794.23 – billed for 8 months
- Office supplies is less than budget due to the timing of purchasing supplies
- General Insurance is greater than budget due to actual insurance costs being greater than budget.

- Telephone/Internet is less than budget due to not receiving invoice for the internet billed through the Northfield Township Technology Consortium
- Equipment Rental & Maintenance is over budget due to unexpected repairs to Christie Projector and Pollak Rooms Screens
- Community Relations is less than budget due to fewer outreach events
- Vehicle Expense is less than budget due to less usage and fewer repairs than budgeted
- Utilities is less than budget due gas costs being higher in the winter as compared to the summer and recording 10 months of gas and 6 months of water expense
- Building Repairs is greater than budget due to unanticipated repairs – repair of glass study room door open/close mechanism, installation of new fire door on the west side of building and creation of gender neutral bathroom in youth services
- Recruiting is less than budget due to using no cost options to publish employment opportunities
- Board Development is over budget due to training opportunities attended

Northbrook Public Library
 Bills, Charges and Transfers for Board of Trustee Approval
 Month of March

Operating Funds	
Library Claims List	\$ 254,696.82
Librarian's Claims List	\$ 13,864.87
Payroll	\$ 333,732.50
Fica/IMRF	\$ 52,302.03
ACH to IPBC	\$ 68,562.43
Total Operating Funds	<u>\$ 723,158.65</u>
Capital Improvement Fund	
Claims List	\$ 122,880.00
	<u>\$ 122,880.00</u>
Debt Service Fund	
Grand Total Library	<u><u>\$ 846,038.65</u></u>

**Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust General Checking**

Transaction Number	Transaction Date	Vendor	Amount	Description
25723	12/20/2022	VOID - Juan Horie	\$ (650.00)	
25828	3/16/2023	66 Degrees, LLC	\$ 12,528.00	annual payment - software - google
25829	3/16/2023	Victor Asuncion	\$ 600.00	monthly payment - programming
25830	3/16/2023	Bright Plum Inc.	\$ 4,250.00	annual payment - professional fees
25831	3/16/2023	First Bankcard	\$ 15,472.80	monthly payment - supplies
25832	3/16/2023	Jayne Herring	\$ 900.00	monthly payment - programming
25833	3/16/2023	Juan Horie	\$ 650.00	monthly payment - programming
25834	3/16/2023	HR Source	\$ 1,000.00	annual payment - professional fees - benchmarking
25835	3/16/2023	Petra Van Nuis	\$ 600.00	monthly payment - programming
25836	3/16/2023	Village of Northbrook Water Dept.	\$ 757.02	quarterly payment - utilities
25837	3/31/2023	VOID		
25838	3/31/2023	VOID		
25839	3/31/2023	The Home Depot Credit Services	\$ 842.40	monthly payment - janitorial supplies
25840	3/31/2023	The Hanover Insurance Company	\$ 48,870.00	annual payment - general insurance
25841	3/31/2023	All American Entertainment	\$ 3,750.00	ILP expense
25842	3/31/2023	Amazon Capital Services	\$ 3,479.15	monthly payment - supplies
25843	3/31/2023	American Library Association	\$ 784.83	monthly payment - staff development
25844	3/31/2023	Authors Unbound Agency	\$ 32,850.00	ILP expense
25845	3/31/2023	Baker & Taylor	\$ 25,176.61	monthly payment - materials
25846	3/31/2023	Baker & Taylor Entertainment	\$ 684.70	monthly payment - materials
25847	3/31/2023	Best Quality Cleaning	\$ 5,475.00	monthly payment - contracted services
25848	3/31/2023	Book Page	\$ 1,080.00	annual payment - community relations
25849	3/31/2023	Criterion Pictures USA	\$ 645.00	monthly payment programming
25850	3/31/2023	Dornfeld Piano Tuning	\$ 1,020.00	quarterly payment - equipment rental and maintenance
25851	3/31/2023	EBSCO Information Services	\$ 3,662.32	annual payment - materials
25852	3/31/2023	Encyclopaedia Britannica, Inc.	\$ 1,435.00	annual payment - materials

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust General Checking

Transaction Number	Transaction Date	Vendor	Amount	Description
25853	3/31/2023	Fifth Star Collective, LLC	\$ 1,062.50	ILP expense
25854	3/31/2023	Gale/Cengage Learning Inc.	\$ 650.96	monthly payment - materials
25855	3/31/2023	Grainger	\$ 1,150.98	monthly payment - janitorial supplies
25856	3/31/2023	Impact Networking LLC	\$ 2,021.96	quarterly payment -photocopy
25857	3/31/2023	Lakeshore Rush NFP	\$ 600.00	monthly payment - programming
25858	3/31/2023	Library Ideas LLC	\$ 665.96	monthly payment - materials
25859	3/31/2023	Limricc - UCGA	\$ 2,636.76	quarterly payment - workers comp / unemployment
25860	3/31/2023	Little Louies	\$ 944.00	annual pyament - staff development
25861	3/31/2023	Mergent, Inc.	\$ 962.00	monthly payment - materials
25862	3/31/2023	Midwest Tape LLC	\$ 7,185.57	monthly payment - materials
25863	3/31/2023	Naxos of America Inc.	\$ 1,075.00	annual payment - materials
25864	3/31/2023	New York Times	\$ 1,039.95	annual payment - materials
25865	3/31/2023	North American Corp of Illinois	\$ 1,934.35	monthly payment - janitorial supplies
25866	3/31/2023	Outsource Solutions Group, Inc.	\$ 20,025.44	Monthly Payment - Contracted Services & Software
25867	3/31/2023	Overdrive	\$ 20,905.45	monthly payment - materials
25868	3/31/2023	Pace Systems INC	\$ 6,250.00	annual payment - equipment rental and maintenance
25869	3/31/2023	Panera, LLC	\$ 1,256.40	annual payment - staff development
25870	3/31/2023	Reaching Across Illinois Library System	\$ 750.00	annual payment - software - communico
25871	3/31/2023	Siemens Industry Inc.	\$ 3,165.34	quarterly payment - contracted services
25872	3/31/2023	Swank Motion Pictures Inc.	\$ 2,626.00	monthly payment - programming
25873	3/31/2023	Symmetry Energy Solutions, LLC	\$ 3,975.80	monthly payment - utiities
25874	3/31/2023	Today's Business Solutions, Inc.	\$ 2,270.53	annual payment - supplies
25875	3/31/2023	Warehouse Direct Inc.	\$ 2,241.00	annual payment - furniture and equipment
25876	3/31/2023	Wells Fargo Vender Fin Serv	\$ 765.00	monthly payment - photocopy
25877	3/31/2023	Wex Health Inc.	\$ 2,673.04	Monthly Payment - Flexible spending, Dedendant Care and Commuter Benefit

\$ 254,696.82

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust Librarian Checking

Transaction Number	Transaction Date	Vendor	Amount
52819	2/23/2023	VOID - Robert Waterbury	(\$50.00)
52824	3/2/2023	Illinois Library Association	\$15.00
52825	3/14/2023	Alert Protective Services	\$323.28
52826	3/14/2023	Aquatic Works LTD	\$185.00
52827	3/14/2023	Annette Bochenek	\$300.00
52828	3/14/2023	J. Kevin Chapman	\$260.00
52829	3/14/2023	Sabina Fazlic	\$125.00
52830	3/14/2023	Firefly Family Theatre LLC	\$450.00
52831	3/14/2023	Eric Flowers	\$33.96
52832	3/14/2023	Benjamin Goluboff	\$250.00
52833	3/14/2023	Happiness Forward LLC	\$100.00
52834	3/14/2023	K&M Printing Company	\$151.20
52835	3/14/2023	Patrick McCallister	\$175.00
52836	3/14/2023	Vu Nguyen	\$22.34
52837	3/14/2023	Northbrook Hardware	\$215.50
52838	3/14/2023	NSYMCA Art Academy	\$280.00
52839	3/14/2023	Petersen Bros. Plastics, Inc.	\$320.00
52840	3/14/2023	Dan Petrosko	\$450.00
52841	3/14/2023	Petty Cash Custodian	\$48.24
52842	3/14/2023	Rotary Club of Northbrook	\$125.00
52843	3/14/2023	Olga Rudiak	\$400.00
52844	3/14/2023	VOID - Charlie Saxe	
52845	3/14/2023	Sujin Song	\$200.00
52846	3/14/2023	Michael Spikes	\$150.00
52847	3/14/2023	Stories Matter Foundation	\$400.00
52848	3/14/2023	The Sewing Source Inc	\$289.99
52849	3/14/2023	University of Illinois Extension-Cook County	\$200.00
52850	3/14/2023	UPS	\$367.16
52851	3/14/2023	VOID - Robert Waterbury	
52852	3/14/2023	Yami Vending Inc.	\$515.54
52853	3/31/2023	AARP	\$16.00
52854	3/31/2023	American Library Association, Membership	\$476.00
52855	3/31/2023	Bayscan Technologies	\$192.00
52856	3/31/2023	CCH Incorporated	\$212.96
52857	3/31/2023	Chicago Distribution Center	\$55.14
52858	3/31/2023	Chicago Tribune	\$191.42
52859	3/31/2023	Cintas	\$498.47
52860	3/31/2023	Rae Goodman-Lucker	\$15.99

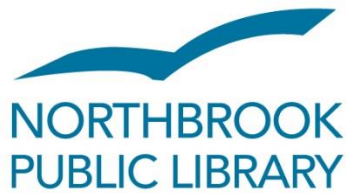
Northbrook Public Library
 Bank Register Report
 Northbrook Bank & Trust Librarian Checking

Transaction Number	Transaction Date	Vendor	Amount
52861	3/31/2023	Jessica Gorelick	\$94.85
52862	3/31/2023	Illinois Heartland Library System-OCLC	\$31.04
52863	3/31/2023	Illinois Library Association	\$150.00
52864	3/31/2023	Image Specialties of Glenview, Inc.	\$13.20
52865	3/31/2023	Byeol Kim	\$500.00
52866	3/31/2023	Kiplinger's Investing for Income	\$109.00
52867	3/31/2023	Luybov Kleiman	\$24.99
52868	3/31/2023	Christopher Laughlin School of Music	\$500.00
52869	3/31/2023	Lechner Services	\$116.80
52870	3/31/2023	Weiwen Ma	\$500.00
52871	3/31/2023	Maria Petrova	\$52.99
52872	3/31/2023	Petty Cash Custodian	\$130.00
52873	3/31/2023	Pioneer Press	\$36.00
52874	3/31/2023	Pitney Bowes Inc.	\$189.00
52875	3/31/2023	Rowman & Littlefield Publishing Group	\$299.92
52876	3/31/2023	Runco Office Supply	\$493.55
52877	3/31/2023	Siobhan Saver	\$17.99
52878	3/31/2023	Charlie Saxe	\$100.00
52879	3/31/2023	Sentrum Marketing, LLC	\$420.20
52880	3/31/2023	Sheet Music Plus	\$74.47
52881	3/31/2023	Sony Pictures Classics	\$300.00
52882	3/31/2023	The Charmm'd Foundation	\$300.00
52883	3/31/2023	The News Literacy Project Inc.	\$150.00
52884	3/31/2023	Tsai Fong Books, Inc.	\$561.45
52885	3/31/2023	Universal Film Exchanges LLC	\$200.00
52886	3/31/2023	UPS	\$18.29
52887	3/31/2023	VBS CAL, LLC	\$124.88
52888	3/31/2023	VSP of Illinois, NFP	\$396.06

\$13,864.87

Northbrook Public Library
Bank Register Report
Northbrook Bank & Trust Capital Improvements

Transaction Number	Transaction Date	Vendor	Amount	Description
1871	3/16/2023	Arlington Glass & Mirror	\$6,930.00	Window replacement - YS
1872	3/31/2023	F.E. Moran Mechanical Services	\$115,950.00	Steam Boiler Project
			<u>\$122,880.00</u>	



Memorandum

DATE: April 14, 2023

TO: Board of Trustees

FROM: Kate Hall, Executive Director

RE: Mandatory COVID Vaccine Policy

In October 2021, the Board of Trustees approved a mandatory COVID vaccine policy as a condition of employment. Since that time, 100% of Northbrook residents have received at least one dose of the primary series and over 90% have received the primary series.

99% of our employees have completed the primary series and over 70% have received the additional boosters. In the past 2+ years we have had no new employees that were not already vaccinated. With the original intent of the policy to keep staff and patrons safe, I feel it has served its purpose and is no longer necessary. We will continue to emphasize health and safety measures with employees, but feel it is no longer necessary for staff and patron safety to track staff vaccination statuses.

There is a resolution included in the packet that I am asking the board to pass which will formally rescind this policy.

A RESOLUTION

RESCINDING MANDATORY COVID-19 VACCINE PROGRAM

WHEREAS, the Northbrook Public Library is a library subject to the Illinois Local Library Act (75 ILCS 5/1 *et seq.*) and its Board of Trustees has the authority to make by-laws, policies, rules and regulations for its own guidance and for the government of the library; and

WHEREAS, on March 9, 2020, J.B. Pritzker, Governor of the State of Illinois, issued a disaster proclamation declaring a state of emergency because of the spread of the COVID-19 virus; and

WHEREAS, Governor Pritzker subsequently issued additional disaster proclamations and Executive Orders encouraging social distancing to fight the spread of COVID-19 and ordering capacity limits for certain facilities, businesses and operations as part of the effort to fight the spread of COVID-19; and

WHEREAS, on October 21, 2021, the Library Board of Trustees adopted a “Mandatory COVID-19 Vaccine Policy” that as a condition of employment, all employees of the Library needed to receive an initial full dose of the COVID-19 vaccine. Employees have been subject to disciplinary action they failed to provide documentatiton of their vaccination or failed to request an exemption; and

WHEREAS, Governor Pritzker has announced that the state’s public health emergecuy due to COVID-19 will end on May 11, 2023; and

WHEREAS, the Northbrook Library’s Board of Trustees now desire to rescind the “Mandatory COVID-19 Vaccine Program” enacted in response to the COVID-19 emergency based on locally improving COVID-19 case numbers, public health metrics and recognizing the current, high number of vaccinated individuals while the Program only required the initial vaccine dose.

NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF TRUSTEES OF THE NORTHBROOK PUBLIC LIBRARY, NORTHBROOK ILLINOIS, as follows, with the foregoing recitals incorporated herein by reference:

That the “Mandatory COVID-19 Vaccine Program” is hereby rescinded and repealed.

BE IT FURTHER RESOLVED that this Resolution shall be filed with the Library’s Secretary as soon as practicable.

BE IT FURTHER RESOLVED that all resolutions, or parts thereof, in conflict with the provisions of this resolution are, to the extent of the conflict, expressly repealed on the effective date of this resolution.

BE IT FURTHER RESOLVED that all provisions of this resolution shall be deemed severable. In the event any provision of this resolution, or any application thereof, shall be found invalid or unenforceable, such finding shall not affect all other provisions of this resolution and all other lawful applications thereof.

BE IT FURTHER RESOLVED that this Resolution shall be in full force and effect from and after its passage and approval.

NORTHBROOK PUBLIC LIBRARY, NORTHBROOK, ILLINOIS

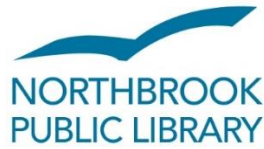
President

Passed: _____

Date

Attest: _____

Library Secretary



1201 Cedar Lane Northbrook, Illinois 60062
847-272-6224
www.northbrook.info

March, 2023

Meeting Notice

Public notice is hereby given that the Board of Trustees of the Northbrook Public Library will conduct their regular monthly meetings at the following times during the 2023-2024 fiscal year (May, 2023 - April, 2024). As identified below, the location of the meetings (unless announced otherwise) will be at 1201 Cedar Lane, Northbrook, IL 60062.

Thursday	May 18, 2023	7:30 p.m.	1201 Cedar Lane
Thursday	June 15, 2023	7:30 p.m.	1201 Cedar Lane
Thursday	July 20, 2023	7:30 p.m.	1201 Cedar Lane
Thursday	August 17, 2023	7:30 p.m.	1201 Cedar Lane
Thursday	September 21, 2023	7:30 p.m.	1201 Cedar Lane
Thursday	October 19, 2023	7:30 p.m.	1201 Cedar Lane
Thursday	November 16, 2023	7:30 p.m.	1201 Cedar Lane
NO DECEMBER MEETING			
Thursday	January 18, 2024	7:30 p.m.	1201 Cedar Lane
Thursday	February 15, 2024	7:30 p.m.	1201 Cedar Lane
Thursday	March 21, 2024	7:30 p.m.	1201 Cedar Lane
Thursday	April 18, 2024	7:30 p.m.	1201 Cedar Lane

Kate Hall
Executive Director

The Northbrook Library intends to comply with the Americans with Disabilities Act by making reasonable accommodations for people with disabilities. If you or someone you know with a disability will require an accommodation for library services, or have any questions about the library's compliance, call 847-272-6224. Hearing impaired individuals may call the TDD number, 847-272-6229, for more information.

DIRECTOR'S REPORT APRIL 2023

AGENDA ITEMS

3 Consent Agenda

- 3.5 Rescind Mandatory COVID Vaccine Mandate
A memo and resolution for the board's consideration on rescinding the 2021 COVID Vaccine Mandate is included in the packet.
- 3.6 Approve FY24 Meeting Dates
The dates for the next fiscal year meetings are included for approval. There are no dates that have been modified due to holidays.

7 Unfinished Business

- 7.1 Zheng Consulting Comprehensive DEI Assessment and Strategy Proposal
Lily will be attending the board meeting virtually for the board to discuss their proposal. I have included their proposal and my memo from last month in the packet.
- 7.2 Decennial Committees on Local Government Efficiency Act
I have included a memo and the attorney's opinion on whether we need to comply. I am attending an information session on Friday, April 14 and will share any updates from the session at the board meeting.
- 7.3 Strategic Plan RFP Review
Copies of the seven proposals are included in the packet. I have also included a memo and analysis on the proposals for the board's review. Also included is a rubric for evaluating the proposals and determining who to bring in for an interview next month. I will be providing sample interview questions for next month's meeting early next week.

8 New Business

- 8.1 Transfer of Funds to Debt Service & CIF
Anna has included a memo outlining our fund balance policy and requesting funds to be transferred to the capital improvement fund and debt service.
- 8.2 Executive Director Performance Review – closed session
I have included a memo for the board outlining last year's review process and a potential process for this year.

Agenda Building

- Swearing in of Trustees
- Election of Board Officers
- Strategic Plan Consultant Interviews
- Personnel Policy Updates for Professional Memberships and Tuition Reimbursement

BOARD NEWS

Legislation

IL Senate Bill 2419 A second piece of legislation, Illinois Senate Bill 2419, is also sponsored by Secretary of State Alexi Giannoulias and is focused on allowing the State Librarian to negotiate with publishers of e-books and e-audiobooks on behalf of libraries in search of reasonable terms. The legislation also allows the State Librarian to award grants that develop, expand, or support the acquisition of e-books and e-audiobooks in Illinois. This legislation is scheduled for a 3rd reading on March 21. RAILS will continue to share information about this bill as more becomes available.

American Library Association Conference

The annual ALA Conference is coming up on June 22-27 in Chicago. If trustees are interested in attending, please let me know. You can learn more about the conference here: <https://2023.alaannual.org/> . There are a [number of sessions for library trustees](#). You can also see [who the featured speakers are here](#). If you are interested in attending, we can sign you up for the whole conference, a day, or get you a pass to the exhibit hall. Please let Anna or I know if you are interested in attending.

UPDATES

Programs & Partnerships

- On March 14th, the library presented “Fact, Fiction, or Opinion: How to Become a Well-Informed Voter and Citizen” in partnership with the League of Women Voters of Glenview/Glencoe as well as the Glenview and Glencoe libraries. The program was moderated by a league board member and included panelists from the News Literacy Project, Northwestern University, as well as local media outlet - The Record Northshore. The program was offered for patrons in person and was live streamed on YouTube.
- We are continuing to work with JCC to have Violins of Hope and the author of the book here. There will 3 days throughout the summer when the violins will be displayed, May 21st, June 2nd and August 6th.
- The library screened 5 Oscar nominated Films in the month of March. There were 1186 in attendance, reflecting a shift back to pre-pandemic programming attendance.

- In March, Illinois Libraries Presents brought Mary Roach to patron screens. Dubbed “America’s funniest science writer” by the Washington Post, Mary Roach has explored topics from the curious lives of human cadavers, packing to visit space, the afterlife, the alimentary canal, and more. Mary generously waived her fee for ILP. 40 Northbrook residents were in attendance.
- The One Book One Northbrook committee is in the process of planning programs for our One Book, One Northbrook series on Clark and Division in October. We have officially booked an in-person event with the author, Naomi Hirahara, in the Auditorium on Wednesday, October 18. We are excited to host an in-person program with the author during our One Book series. Phil Collins will be joining the board meeting to share more about what is being planned for One Book One Northbrook.

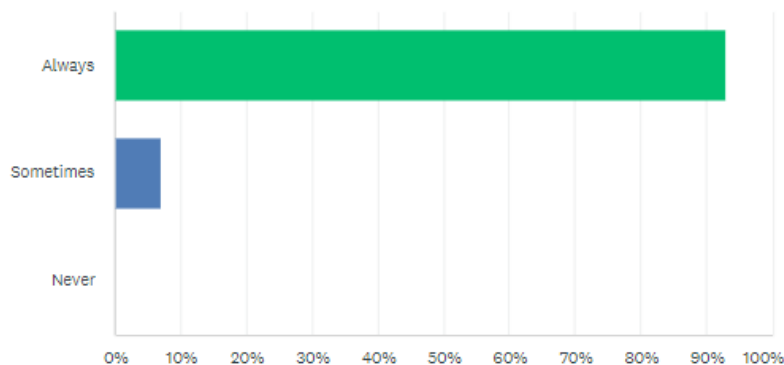
Publicity

Our Marketing team recently conducted a survey to evaluate people's engagement with our printed/mailed newsletter. The survey was distributed via our newsletter, emails, and social media from mid-February through March 31. We received a total of 110 responses, out of which 103 responses were from Northbrook residents. We received 3 responses from the link in our newsletter, 65 from our adult email, 19 from our social media post, and 16 from the Youth Services email. The results overwhelmingly show that patrons read and value the newsletter. This information is helpful as we move from a bi-monthly to quarterly newsletter cycle.

Here are some of the key findings from the survey data.

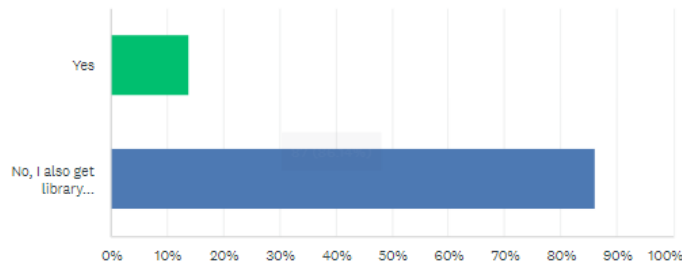
How often do you read the Northbrook Public Library newsletter?

Answered: 101 Skipped: 9



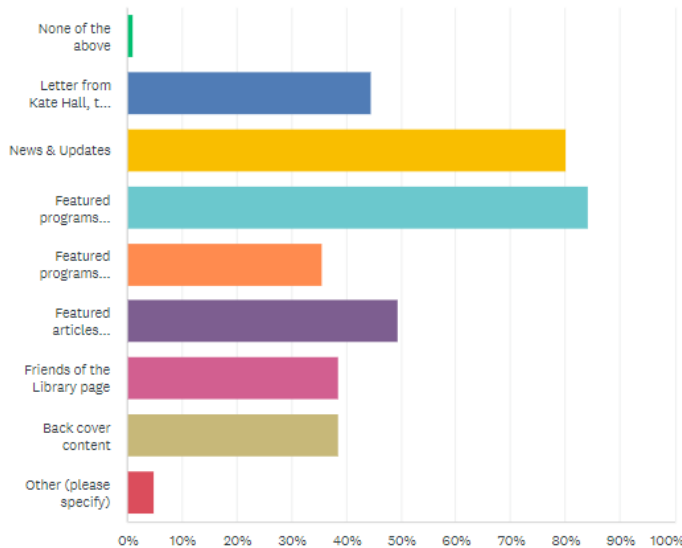
Is our newsletter the only way you receive information about our library's programs and services?

Answered: 101 Skipped: 9



Which sections of the newsletter do you and/or members of your household find most valuable? Check all that apply. If you don't read the newsletter, please select "None of the Above."

Answered: 101 Skipped: 9



Here are some of the patron comments from the survey:

- I love the newsletter—especially the little literacy tips you include for early childhood literacy! I've shared that information with other "mom friends" as well as with early childhood educators. It's gold :)
- Wonderful programs. Helpful friendly staff. Feels like a second home!
- I know my daughter reads it. She is 39 and has 2 little girls who love to go to the library They read the newsletter together!
- We love the Newsletter! It helps us plan for activities for our daughter. She also reads it and gets excited about the programs.
- Nice to hold it in my hands rather than have to read it online.

- It provides valuable information about our outstanding library and should continue to be mailed.
- Keep it up - it's beautiful, classy, and interesting. And frankly, I like getting the paper copy.

EDI

Based on action items from the After-Action Report, three new EDI Committee workgroups were created:

- Communications: This workgroup will be working with all staff to create shared definitions of EDI terms and create an accessible and inclusive vocabulary guide for staff to use.
- EDI Toolkit: Staff will be redesigning our online EDI toolkit to make it easier to navigate for staff and create a record of the work being done by staff on our EDI efforts.
- Steering: This workgroup will be continuing to review our hiring practices and procedures and looking for areas to clarify and better communicate what our hiring practices are.

Michelle Mistalski and Susan Wolf, EDI Committee Co-Chairs will be presenting to the board at the meeting on the work that the committee has done over the past two years.



Collections

Facebook Post: Library of Things – New Items

Posted March 11

Facebook Reach: 1,800

Reactions: 59

- Starting on March 1, only Northbrook patrons can place holds on items in the Library of Things, allowing them to get popular items more quickly.

- An additional Slide n Scan was added to the collection, along with a replacement for the first one, bringing the total number of Slide n Scans to three. This should help to fill the long holds list.
- A Cricut and portable photo studio are now in the collection. Both were checked out in March and have holds.

HR

Staff Change in Status

- Stephanie Bremner, changed from part-time Librarian (YS) to full-time Teen Librarian effective March 16.

Leave of Absence

- Jane Huh, regular part-time Library Assistant (YS) returned from her maternity leave on March 1.
- Brian Nelson, full-time Acquisitions Supervisor (TS) began his (the library's 1st) paid parental leave.
- Kelly Durov returned from her leave on April 12, 2023.

Staff Training

- The 2nd in a three-part series of trainings with other area libraries happened on March 9. 19 staff attended the virtual Bystander Intervention Training with Right To Be. Staff will be able to attend the last workshop, a virtual Conflict De-Escalation Training on May 4 presented by Right To Be.
- Our annual Staff Development Day is coming up on May 19. We will be back in person and having presentations around our EDI and sustainability work. We are also doing department tours to introduce new and existing staff to the work done by each department.

Project Updates

Steam Humidification Boiler

FE Moran has completed work – Punch list, water meter installation and control work with Siemens is outstanding

Salary Benchmarking

We are awaiting the salary benchmarking results and payroll analysis from HR Source. They have reported that they should have the report in the next week for our review. I hope to have something more specific to share with the board at the May meeting.

Kate Hall, Executive Director

COLLABORATORY UPDATE

Prepared by: Cathleen Doyle
March, 2023

PROJECTS



Monthly Report 1

MATERIALS

March projects by material type charged:

3D Printing	60
Acrylic	90
Buttons	78
Cardstock	28
Cork Coasters	21
DVDs	4
Embroidery Thread	9
Glasses	5
HDPE	0
Iron-on	14
Keychains	9
Stabilizer Sheets	19
Stamp Block	1
Vinyl & Transfer Paper	13
Wood	40

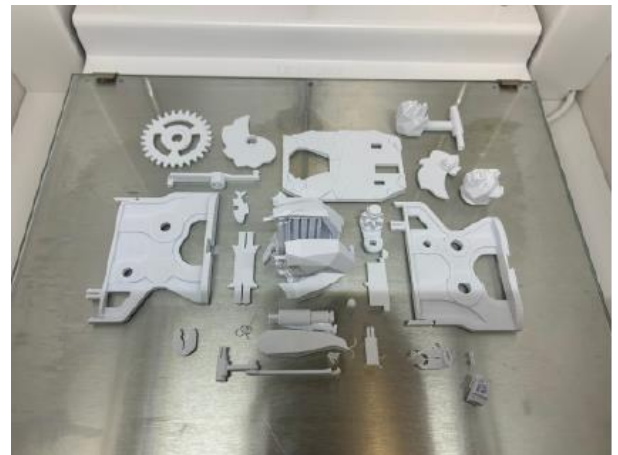


3D PRINTING

We printed 82 objects for users in March.

VISITORS

588 people visited the Collaboratory in March.



STATISTICS MARCH 2023

These statistics represent year-to-date counts from May 1, 2022 - March 31, 2023, compared to the same time period for last year, unless otherwise noted. During the month of March, we continued to see high study room and wifi usage, but continue to see lower numbers across the board in terms of programming. That tide does seem to be shifting a bit as we have had a number of the Oscar films in March be full houses as well as being almost at capacity for several of the live concerts. What is clear when looking at the numbers is that people are definitely coming back into the library, but may not be using it in the same way they did previously.

CARD HOLDERS (AS OF MARCH 31)

17,763 total cardholders

17,174 Residents 528 Non-Residents 61 Businesses

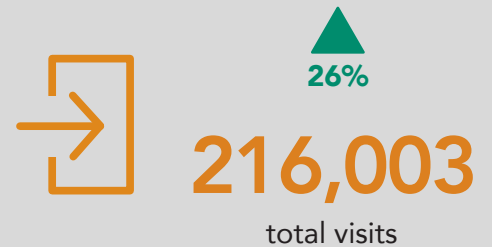


35,222 total residents

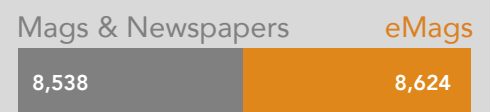
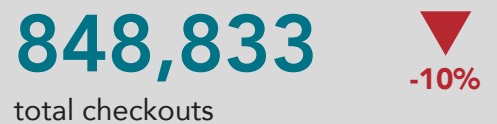
50% cardholder rate vs. 53% national average

Based on Institute for Museum and Library Services data
www.ims.gov/research-evaluation/data-collection/public-libraries-survey

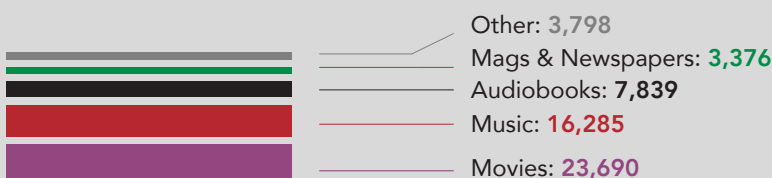
VISITS



CHECKOUTS



COLLECTION (AS OF MARCH 31)



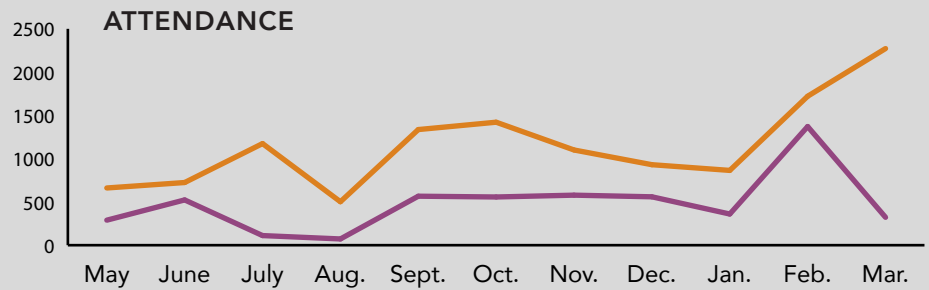
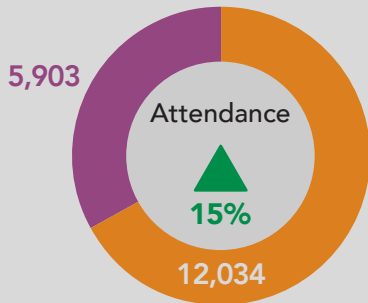
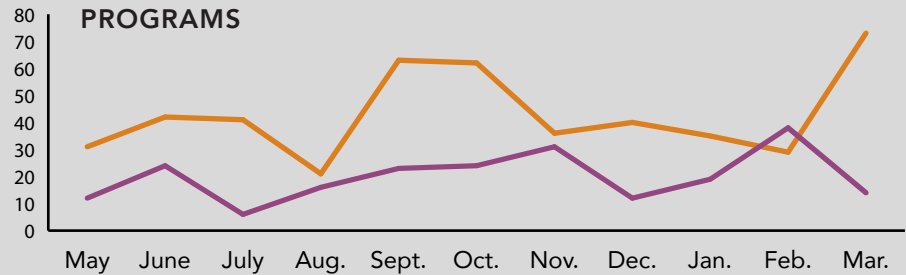
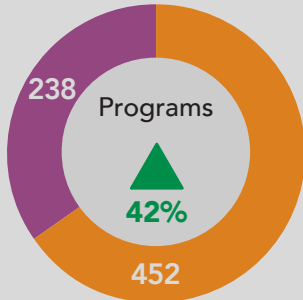
359,724 total collection

STATISTICS MARCH 2023

PROGRAMS

● Virtual ● In-Person

The circle graph represents year to date cumulative attendance. The line graphs represent our monthly changes in the number of programs offered and total attendees.



HOME DELIVERY



440
home deliveries

▲
15%

ROOM BOOKINGS



9,245
study room bookings

▲
98%



300
meeting room bookings

▲
200%

TECHNOLOGY



9,362
computer sessions

▲
84%



120,400
WiFi sessions

▲
39%

Comment	Response	Staff Member Responding
<p>The NPL is one of Northbrook's crown jewels and we do not want to loose access to our accounts.</p>	<p>As part of the switch to using the National Change of Address system to renew library cards, Diane Raucci has been contacting patrons that no longer live in Northbrook to verify their new address and give them info on getting a card in their new location. This is one of the response received from this process.</p>	<p>Donna Beach</p>
<p>Last night I attended the Library's Power Point lesson with Sandy (sp). Learned new skills that I'll be using on upcoming Power Point work.</p> <p>Two suggestions.</p> <p>A follow up Power Point lesson on how to actually prepare, maybe create is a better term, a Power Point presentation would be great. Think this would be along the how to write a paper. Outline, text, etc. Since Sandy has recently retired from teaching English at Glenbrook South she might be the instructor for this class.</p> <p>the scheduled starting time for the class was 7:00P.M.....yet we waited till 7:05 P.M before starting. The rationale was that some people arrive late. There is NO reason to wait for those that are delinquent. Why punish those of us that arrive on time. Delaying the starting time supports late arrivals...not a good idea.</p> <p>Sandy's notes/instructions are very helpful.</p> <p>Am available to discuss these suggestions.</p>	<p>Thank you so much for your feedback on the PowerPoint class and we are glad it was helpful. We will share your suggestion for a follow up class on how to create and structure a PowerPoint presentation with the librarian who oversees our technology classes. We will also discuss your feedback about starting late with our instructors. Thanks again for taking the time to reach out.</p>	<p>Tracy Gossage</p>
<p>A patron stopped by the Reference desk to commend us on the selection of books available at our library. She also said we are very professional and maintain a quiet place to focus at the library.</p>	<p>Thank you for this feedback. We will share this comment with the librarians who manage this collection.</p>	<p>Tracy Gossage</p>

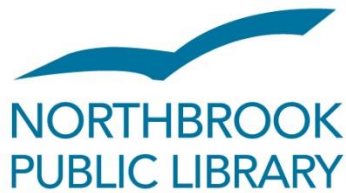
March 2023 Patron Comments

<p>Thank you for your message. I had more than 20 years of enjoyable living in Northbrook. It's my favorable place and I have many fond memories of it. I have used the Northbrook library numerous times and I truly appreciate the facility and the friendly and helpful services there. I have found a new library in where I live. It also provides good services just like NPL.</p>	<p>As part of the switch to using the National Change of Address system to renew library cards, Diane Raucci has been contacting patrons that no longer live in Northbrook to verify their new address and give them info on getting a card in their new location. This is one of the response received from this process.</p>	<p>Donna Beach</p>
<p>Thank you for all the 51 years the Northbrook Library has been there for us. We have relocated to Watertown, WI and are trying to adjust to our new library. We will always love Northbrook!</p>	<p>As part of the switch to using the National Change of Address system to renew library cards, Diane Raucci has been contacting patrons that no longer live in Northbrook to verify their new address and give them info on getting a card in their new location. This is one of the response received from this process.</p>	<p>Donna Beach</p>
<p>I wasn't certain who at the library to contact, so I'm reaching out to you. I'm writing to share the sad news that my Stepfather, Thomas Tabern – who was a longtime patron of the Northbrook Library -- passed away on 1/1/23. I know that Tom and my late Mother Beverly, made such use of many of your wonderful services over the 30+ years they were married, and were grateful to have such a beautifully run facility to turn to. Would you please share this news with your colleagues and thank them on my behalf for all of the many resources, concerts, films and talks you so lovingly provided for my parents for many years.</p> <p>Would you please share this news with your colleagues and thank them on my behalf for all of the many resources, concerts, films and talks you so lovingly provided for my parents for many years.</p>	<p>My condolences on the passing of your father. I will certainly share this with the staff and express your appreciation. Thank you for taking the time to send this.</p>	<p>Kate Hall</p>

<p>I am a Northbrook resident and I frequent the Northbrook Public Library. On a recent visit to the library I found that a tampon dispenser had been installed in the men's washroom. As you can imagine I was quite surprised to find a tampon dispenser in a men's washroom, since MEN DO NOT MENSTRATE, AND THEREFORE HAVE NO USE FOR TAMPONS. I assume that this waste of taxpayer funds was done with the knowledge and consent of the Board, in order to demonstrate that the library is all "woked-up". Here's an idea: concentrate on operating the library, and if you individually want to engage in idiotic and meaningless virtue signaling, do so on your time and on your dollar.</p>	<p>This was mailed in and had no contact information to get in touch with the patron.</p>	<p>Kate Hall</p>
<p>A non-Korean speaking caregiver and young girl were peeking into the YSAR as the 3/17 Korean Language Storytime program was about to begin. I told them about the storytime and encouraged them to go in as it was not yet full. They said they would try it out for a bit and then went inside. They stayed for the entire program. At the end of the program the caregiver approached me and said how well done it was and how much they enjoyed it. She was very happy to have the opportunity to expose her child to another language, and especially in the storytime format at the library.</p>		

March 2023 Patron Comments

<p>The President of the Friends of the Library stopped by the Youth Services desk after viewing the various book displays in the YS department including Popular Picks, new book display, monthly special displays and other book features in the department. She provided us (Sara Chase and Miles Schwartz) with wonderful and positive feedback about both the quality of the displays as well as all the excellent programs that the department is offering to our patrons. This compliment was for the entire department. Miles and I were the fortunate staff members to receive her kind words. Merrill mentioned that she was aware of the comments and behaviors that have been less than supportive in terms of our displays and services. She voiced her opinion that we are doing a wonderful job and should be valued and commended for our good work. We thanked her profusely- both for her comment and the Friends' support of library programs- and wished her a lovely afternoon.</p>	<p>We thanked her profusely- both for her comment and the Friends' support of library programs- and wished her a lovely afternoon.</p>	
<p>Leslie stopped by the F&M and asked for Lev by name. She said she had recently moved to Northbrook and was very complimentary about the variety of programs we offer. She said there was not a lot of programs for adults at her old library. She asked about having film discussions following showings in the auditorium as well as more chair yoga sessions. Caitlyn, who was also at the desk, explained that in the past we did do back to back chair yoga sessions and I mentioned we do have film discussion programs separate from the films being shown in the auditorium. Leslie also complimented our concerts. Overall a very happy patron!</p>	<p>We thanked Leslie for her kind words.</p>	<p>Lev Kalmens</p>
<p>I came in on a Thursday evening to monogram a cutting board. Joe C. helped me thru the process (he did it - I pressed the button). He was professional, knowledgeable, and very friendly. He is a great asset to the library and great employee.</p>	<p>Thank you for the comment about your service in the Collaboratory. We have shared your kind words with Joe.</p>	



Memorandum

DATE: March 7, 2023

TO: Board of Trustees

FROM: Kate Hall, Executive Director

RE: Zheng Consulting Comprehensive DEI Assessment & Strategy Proposal

Lily Zheng has provided a proposal that will help us assess and create an EDI strategy with measurable goals. In light of the work with the strategic plan, I see this work as happening in tandem with that process. By taking an intersectional approach doing a quantitative and qualitative assessment of our staff and community, we can gather a baseline of where we currently are in our EDI efforts and create an action plan with measurable goals and outcomes that will be added into the larger strategic plan.

I have included the proposal from Lily in the packet and have also provided some additional information below.

APPROACH

This is a broad overview of their approach as outlined by Lily on their website:

No-nonsense.

I will always tell it like it is, and get your organization to where it needs to be as efficiently and effectively as possible. My goal isn't to inconvenience or embarrass senior leaders, but to create impactful change—which sometimes requires grappling with hard truths.

One size never fits all.

Every service I provide, from strategy consulting to DEI assessment, is designed to take my clients' unique situation into account to create high-impact change. My role is to find the best path for your organization to achieving DEI, assisting you with that path if the work that I do is a good fit, and helping you find the right experts if it's not.

Purposeful and pragmatic work.

My work is more than services offered; it's challenges resolved. Expect any partnership with me to involve exploratory work with quantitative and qualitative data (both are necessary) and close collaboration to make sense of your organization's story. Almost every project I've worked on has ended by solving a problem at least slightly different than the one described to me in the first meeting.

Systemic, not individual.

My specialty is getting to the heart of organizational and DEI problems, formulating strategies to solve them, and empowering leaders to carry out effective change on the organizational level. My approach focuses on the structural and cultural levers to make change, rather than trying to change every individual's hearts and minds, and prioritizes working with stakeholder leaders.

BIO

Lily Zheng (they/them) is a Diversity, Equity, & Inclusion strategist and consultant who works with organizational leaders to turn their positive intentions into positive impact. A dedicated change-maker and advocate named Forbes D&I Trailblazer, 2021 DEI Influencer, and Top Voice on Racial Equity, Zheng's writings have been features in the Harvard Business Review, NY Times, and NPL. They have authored Gender Ambiguity in the Workplace (2017), The Ethical Sellout (2019), DEI Deconstructed: Your No-Nonsense Guide to Doing the Work and Doing it Right (2022).

MEASURING RESULTS

One of the key challenges with EDI work is measuring the effectiveness of the work being done. As a consultant that focuses on outcomes-based assessments, I wanted to understand how Lily measures their own effectiveness.

How did your work succeed, and how did you determine that it succeeded?

In general, my work succeeds because it's data-driven, participatory (achieved with input from multiple stakeholders), and creates shared accountability/interdependence for success. This means that success is measured by hard data--both qual and quant--showing so, as well as a shared sense of success among the stakeholders involved in the process.

How can we know that your work will succeed with us, and how will we know when it has?

My role in this project is to deploy a high-quality assessment framework that creates a quantitative foundation for Northbrook Public Library's DEI journey and progress, and then work with stakeholders to build on that foundation with an effective DEI strategy. We can measure the success of the DEI strategy by comparing the scores from the 2023 assessment

against the scores from the 2024 assessment, and in a more meta sense, measure the success of the overall surveying effort by the participation in the follow-up strategy work and engagement in the second survey. If my work failed, the biggest indicators would be low engagement with the DEI strategy effort, higher rates of unproductive conflict in day-to-day experiences, and low participation in the 2024 assessment.

PROPOSAL

They are proposing a four-part process that will be conducted over the next year and a half.

Phase	Start	End	Activity
1 DEI Exploratory Assessment	5/1/2023	6/30/2023	Project KO and Review Relationship Building Exploratory Assessment Design & Administration Exploratory Assessment Data Analysis and Brief
2 DEI Baseline Assessment	7/1/2023	10/31/2023	Baseline Assessment Design and Advising Additional Data Collection Baseline Assessment Data Analysis and Report Ongoing Communication Support and Guidance
3 DEI Strategy Development	11/1/2023	2/28/2023	DEI Strategy Working Group Formation DEI Strategy Sessions DEI Strategy Consulting
4 DEI Follow-Up Assessment	7/1/2023	10/31/2024	Follow-Up Assessment Advising Additional Data Collection Follow-Up Assessment Data Analysis and Report DEI Strategy Recalibration Ongoing Communications Support and Guidance Project Handoff

COSTS

Phase	Start	End	Cost
1 DEI Exploratory Assessment	5/1/2023	6/30/2023	\$ 5,550.00
2 DEI Baseline Assessment	7/1/2023	10/31/2023	\$ 19,485.00
3 DEI Strategy Development	11/1/2023	2/28/2023	\$ 15,925.00
4 DEI Follow-Up Assessment	7/1/2023	10/31/2024	\$ 25,935.00

ZHENG CONSULTING PROPOSAL FOR SERVICES

Diversity, Equity & Inclusion Consulting

COMPREHENSIVE DEI ASSESSMENT AND STRATEGY

Lily Zheng (Consultant) will partner with the Northbrook Public Library (Client) on a **DEI assessment project**. Project will begin with a lightweight **exploratory DEI assessment**. Depending on the results of this assessment, Consultant will further partner with Client to conduct a **comprehensive 2-year DEI assessment**, develop a **formal DEI strategy with short, medium, and long-term goals**, and offer ongoing **DEI consulting**. The following proposal is divided by phase, with each phase including proposed services. This proposal may be modified and updated over time.

Phase One: DEI Exploratory Assessment

In Phase One of the project, lasting from **May to June 2023**, Consultant will work closely with Client stakeholders to **design and launch a lightweight DEI exploratory assessment**. This assessment will gauge Client readiness for a more comprehensive DEI assessment process and measure respondent trust in Client leadership and expectations for a comprehensive assessment process.

- **Project Kickoff and Review.** Consultant will be introduced to the Client organization through a virtual meeting and separately begin reviewing any background materials, documents, and deliverables relevant to this project, especially materials from previous DEI efforts.
- **Relationship Building.** Consultant will virtually meet stakeholder groups relevant to this project to develop relationship, seek to learn key perspectives, and create the foundation for working relationships later in the project.
- **Exploratory Assessment Design and Administration.** Consultant will work with key Client stakeholders to establish the scope of a lightweight exploratory assessment to gauge stakeholder trust and DEI-related expectations, design custom qualitative and quantitative questions, advise Client on survey communications, and administer the survey to the Client organization.
- **Exploratory Assessment Data Analysis and Brief.** Consultant will analyze data from the Exploratory Assessment, as well as background materials from the Project Kickoff, and synthesize findings into an Exploratory Assessment Brief. Brief will include a final assessment on whether Client organization has the requisite trust to effectively launch a more comprehensive DEI assessment effort, and regardless of this conclusion, short-term recommendations for Client to implement prior to a comprehensive DEI assessment to ensure the highest odds of success.



Phase Two: DEI Baseline Assessment

In Phase Two of the project, lasting from **July to October 2023**, Consultant will conduct a multi-pronged DEI assessment, advising the administration of a DEI Survey through a third-party survey platform (e.g., CultureAmp) and collecting additional qualitative data from employees. Phase Two of the project includes the following services:

- **Baseline Assessment Design and Advising.** Consultant will work with key Client stakeholders to customize a third-party DEI survey with additional qualitative and quantitative questions, advise Client on survey communications, and advise key Client stakeholders on survey administration. Consultant will steward qualitative data.
- **Additional Data Collection.** Consultant will conduct a preliminary review of high-level survey data to identify gaps in available data and collect additional qualitative data *if needed* through mini surveys sent to specific stakeholder groups. Consultant will steward collected data.
- **Baseline Assessment Data Analysis and Report.** Consultant will conduct a comprehensive analysis of available quantitative and qualitative data and synthesize findings into a DEI Baseline Assessment Report. Report will include a full analysis of Client's existing structure, culture, and strategy, intersectional analyses of survey findings, and a set of strategic recommendations to achieve progress on DEI outcomes over the following year. The report will be presented to key stakeholders in a 90-minute virtual session, then to all members of the Client organization in a 2-hour virtual session.
- **Ongoing Communications Support and Guidance.** Consultant will offer ongoing consulting to Client during this phase to support stakeholder communications, answer questions related to the assessment process, and guide leadership communications and action.

Phase Three: DEI Strategy Development

In Phase Three of the project, lasting from **October 2023 to February 2024**, Consultant will facilitate the creation of a custom DEI Strategy through a participatory, stakeholder-driven process. Phase Three of the project may include the following services:

- **DEI Strategy Working Group Formation.** Consultant will advise and consult on the formation of a **short-term working group** to own the DEI strategy development process. Consulting will focus on include member selection, expectation setting, and communications.
- **DEI Strategy Sessions.** Consultant will design and facilitate **two 90-minute DEI Strategy Sessions** with the DEI Strategy Working Group, soliciting ideas from the entire Client organization, to develop and refine a tailored DEI Strategy for the Northbrook Public Library.
- **DEI Strategy Consulting.** Consultant will also consult for Client stakeholders on other Client-led steps in the strategy development process, including reviewing drafts of the DEI Strategy, sharing additional strategy development best practices, and suggesting refinements.



Phase Four: DEI Follow-Up Assessment

In Phase Four of the project, lasting from **July to October 2024**, Consultant will again conduct a multi-pronged DEI assessment, as similar as possible to the Baseline Survey, collect additional qualitative data from employees, and reassess Client outcomes. Phase Four of the project includes the following services:

- **Follow-Up Assessment Advising.** Consultant will advise Client on survey communications and survey administration.
- **Additional Data Collection.** Consultant will conduct a preliminary review of high-level survey data to identify gaps in available data and collect additional qualitative data through mini surveys sent to specific stakeholder groups. Consultant will steward collected data.
- **Follow-Up Assessment Data Analysis and Report.** Consultant will conduct a comprehensive analysis of available quantitative and qualitative data and synthesize findings into a DEI Follow-Up Assessment Report. Report will include a re-analysis of Client's existing structure, culture, and strategy, intersectional analyses of survey findings, and a progress assessment measuring changes from the Baseline Assessment. The report will be presented to key stakeholders in a 90-minute virtual session, then to all members of the Client organization in a 2-hour virtual session.
- **DEI Strategy Recalibration.** Consultant will suggest updates and revisions to the existing **DEI Strategy** to integrate new insights from the assessment process, including additional recommendations for new DEI interventions, practices, or initiatives if relevant.
- **Ongoing Communications Support and Guidance.** Consultant will offer ongoing consulting to Client during this phase to support stakeholder communications, answer questions related to the assessment process, and guide leadership communications and action.
- **Project Handoff.** At the close of the final month of engagement, to be jointly decided by Client and Consultant, Consultant will hand off all non-sensitive information with Client and key stakeholders and formally end the project.

Project Administration and Logistics

Throughout the project, Consultant will communicate and coordinate with Client via email and video call. Consultant will also offer no more than **3** hours of time, monthly, for miscellaneous communications and work outside of the above scope during all project phases. Additional non-scoped communications or work delivered past this point, barring amendments to this proposal, will be billed at **\$500.00/hr.**



PHASE ONE FEES

Service Description	Deliverable	Fee
Project Kickoff and Review	Stakeholder Meetings	\$1,100.00
Relationship Building	Stakeholder Meetings	\$1,900.00
Exploratory Assessment Design and Administration	Exploratory Assessment, Consulting	\$800.00
Exploratory Assessment Analysis and Brief	Brief and Recommendations	\$1,750.00
Phase One:		\$5,550.00

PHASE TWO FEES

Service Description	Deliverable	Fee
Baseline Assessment Design and Advising	Baseline Assessment, Consulting	\$825.00
Additional Data Collection*	Stakeholder Mini Surveys	\$1,410.00*
Baseline Assessment Data Analysis and Report	DEI Baseline Assessment Report	\$15,750.00
Ongoing Communications Support and Guidance	Consulting	\$1,500.00
Phase Two:		\$19,485.00

*Additional Data Collection will only occur and be billed for if Consultant and Client agree that it is necessary.



PHASE THREE FEES

Service Description	Deliverable	Fee
DEI Strategy Working Group Formation	Stakeholder Meetings, Consulting	\$925.00
DEI Strategy Sessions	2 90-Minute Workshops, Stakeholder Meetings	\$12,500.00
DEI Strategy Consulting	Consulting	\$2,500.00
Phase Three:		\$15,925.00

PHASE FOUR FEES

Service Description	Deliverable	Fee
Follow-Up Assessment Advising	Consulting	\$250.00
Additional Data Collection	Stakeholder Mini Surveys	\$1,410.00
Follow-Up Assessment Data Analysis and Report	DEI Follow-Up Assessment Report	\$18,200.00
DEI Strategy Recalibration	Recommendations Document	\$3,800.00
Ongoing Communications Support and Guidance	Consulting	\$1,500.00
Project Handoff	Stakeholder Meetings	\$775.00
Phase Four:		\$25,935.00

Proposed Project Total:	\$66,895.00
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ADDITIONAL INFORMATION

This proposal may be revised, re-dated, and re-signed throughout the project if Consultant and Client agree to modify the project scope. Following signing of this finalized proposal, Client and Consultant will begin scheduling a time for the first meeting of the Project Kickoff, and Consultant will send an invoice for 100% of the Phase One total. Subsequent phases will be billed upon completion of the previous phase. All invoices payment terms Net30; Interest at 1.5% per month after 30 days. If using PayPal, there will be a 3% service charge to the total invoice amount paid.

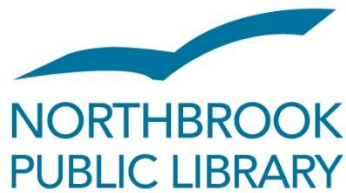
SIGNATURES

Inquiries can be directed to Lily Zheng at lily@lilyzheng.co. Thank you for your business!

Date	Name	Consultant Signature
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Date	Name	Client Signature
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Memorandum

DATE: April 11, 2023

TO: Board of Trustees

FROM: Kate Hall, Executive Director

RE: Decennial Committee on Local Government Efficiency Act

Our attorney from Ancel Glink, Britt Isaly, has provided the attached memo outlining the opinion of Ancel Glink regarding whether the library has to comply with this act.

Essentially, they are saying maybe, but it is unclear and various bodies and agencies have weighed in on either side.

The board must decide on whether you would like to move forward with a committee. If the board so chooses, I would like to discuss the makeup of the committee. The board would need to appoint committee members by the June 10 deadline. All board members are required to be on the committee as am I. We also are required to have at least two community members. If the board moves forward, I would recommend soliciting the community for interested members to participate.

I look forward to talking with the board about next steps.



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MEMORANDUM

To: Northbrook Public Library

From: Britt Isaly, Ancel Glink

Subject: Compliance with the Decennial Committee on Local Government Efficiency Act, 50 ILCS 70/1 *et seq.*

Date: April 10, 2023

On June 10, 2022, Governor Pritzker signed the Decennial Committee on Local Government Efficiency Act, 50 ILCS 70/1 *et seq.*, into law. This law requires all Illinois local governments that impose a tax (as defined in the Act and exempting municipalities and counties) to convene a committee to study and report on local government efficiency. There are certain actions that impacted local governments must take as the first step in compliance with this law by no later than June 10, 2023.

Under this law, impacted local governments must:

1. Form a committee to study local efficiencies and meet for the first time no later than June 10, 2023.
2. Have the committee meet at least three times.
3. Prepare a written report with recommendations (if any) on efficiencies and increased accountability.
4. File the report with the county (or each county in which your local government is located).

WHO HAS TO COMPLY?

The Act applies to "all entities that levy taxes and are also units of local government, as defined in Section 1 of Article VII of the Illinois Constitution, except municipalities and counties." This definition clearly includes library districts, as they are units of local government that levy taxes.

A question has been raised whether municipal libraries organized under the Local Library Act (including village and city libraries) must also comply with the Act. Unfortunately, this is not quite as clear under the Act.

Some municipal libraries have been advised by the municipal attorney that they do not need to comply because they are exempt under the "municipalities" exemption. This interpretation seems difficult to justify, however, as "municipalities" are separate governmental entities organized under the Illinois Municipal Code, where municipal libraries are organized under the Local Library Act, with both government entities having separate governing bodies. Moreover, the Attorney

ANCEL GLINK
April 10, 2023
Page 2

General has issued an opinion that municipal libraries are considered “units of local government” under Section 1 of Article VII of the Illinois Constitution, as special districts, separate and apart from municipalities. *See* Ill. Atty. Gen. Op. 81-002

An alternative argument for exempting municipal libraries from the Act that seems more legally defensible is that although municipal libraries fall within the definition of “units of local government, as defined in Section of Article VII of the Illinois Constitution,” they do not levy taxes solely on their own behalf – instead, the municipality levies the library tax on the library’s behalf. There are several Attorney General opinions finding that while municipal libraries are “units of local government” under the Illinois constitution, they do not have the authority to levy taxes. *See* Ill. Atty. Gen. Op. 98-002. Since the Act only requires units of local government that “levy taxes” to comply with the Act, there is a legally defensible argument that municipal libraries are not subject to the Act.

As I understand it, the Illinois Library Association (ILA) has taken the position that municipal libraries do not have to comply with the Act, providing some support to municipal libraries if they choose that position.

Although there is a defensible argument that city and village libraries established under the Local Library Act do not have to comply with the Decennial Act, that would not prevent a library from choosing to take a more conservative approach and follow the procedures set out in the Act.

Ultimately, each municipal library will need to make the determination itself whether to comply with the Act and form a committee and should consult with their legal counsel on this matter.

WHO HAS TO BE ON THE COMMITTEE?

Section 10(b) of the Act specifies that the committee’s membership must include the elected or appointed members of the governing board. In addition, it must include any chief executive officer (such as the library director) and “other officer” of the local government. The committee must also include at least two residents within the territory served by the local government who are appointed by the committee chair. The committee chair can also appoint others to serve on the committee. Committee members are not compensated but can be reimbursed for any committee-related expenses.

WHAT DOES THE COMMITTEE HAVE TO DO?

The committee is required to meet at least three times, with the first meeting occurring no later than June 10, 2023. The committee meeting can be the same day as the governing body’s board meeting. It can even be a part of the regular board meeting, provided the committee meeting is listed as a part of the meeting agenda and there is a majority of the committee members present. All other requirements of the Open Meetings Act (notice, minutes, etc.) also apply to these committee meetings.

WHAT NEEDS TO HAPPEN AT THESE COMMITTEE MEETINGS?

The committee must “summarize its work and findings within a written report, which must include recommendations in respect to increased accountability and efficiency and must provide the report to the county board in which the governmental unit is located no later than 18 months after the formation of the committee.” The goal is for the committee to study and report on local government efficiencies. Ultimately, this can be as simple or complex as you make it.

To assist libraries in working through the process of discussing, considering, and preparing the required report, we put together a draft sample report (attached as **Exhibit A**). Note that the specifics of the report are not detailed in the Act itself, so Libraries could customize the attached sample template or create its own report that meets its needs.

First meeting: This meeting would essentially be an “organizational” meeting to identify committee members, set deadlines for next steps, designate different committee members to compile information and identify efficiencies the local government currently has in place, and whether there are increased opportunities for efficiency and whether there are additional opportunities for accountability. This would include identifying any intergovernmental agreements currently have in place, or whether there are additional opportunities for intergovernmental cooperation (sharing equipment, personnel, resources, etc.). The committee can also discuss at this meeting whether the committee members want to gather and analyze information, or whether it wants to employ specialists in public administration and governmental management or other consultants. Keep in mind that this law is an unfunded mandate, so payment for anyone hired by the committee will have to come from library funds.

Second meeting: This meeting could be used to take the information gathered by the committee and compile it into a draft report. The committee can also identify any additional information that might be needed to prepare a final report.

Third meeting: At this meeting, the committee can finalize and approve the report.

Remember, the Act requires a *minimum* of three meetings; however, a committee could have as many meetings as it needs or wants. These meetings could be held throughout the year leading up to the report deadline, which is 18 months after the first committee meeting.

Additional Requirements: At the end of each meeting, the committee must “conduct a survey of residents who attended asking for input on the matters discussed at the meeting.” A committee could poll the people present at the meeting while at the meeting or send out an email survey following the meeting to those attendees who provided an email address to the committee.

WHAT DO WE DO WITH THE REPORT ONCE IT HAS BEEN PREPARED?

Section 25 of the Act requires the committee to provide its report to the county board. In addition, the Act provides that the reports must be available to the public, so libraries might consider posting the reports on their websites or making sure the reports are readily available upon request.

Exhibit A¹

**SAMPLE LIBRARY REPORT FOR COMPLIANCE WITH DECENNIAL
COMMITTEES ON LOCAL GOVERNMENT EFFICIENCY ACT**

I. Unit of government submitting this report:

Name of Library: _____

Address of Main Library Office: _____

II. Information about our Library

- A. We are located in _____ County. There are _____ libraries in our County.
- B. The population of the territory in which our Library is located is _____ (as of 2020 census).
- C. We have _____ employees of the Library (not including board members).
- D. Our annual budget for FY _____ is: \$ _____.
- E. Our Library's equalized assessed valuation (EAV) for 2023 is \$ _____.

III. Information about Our Committee

A. Committee Members:

Board President _____

Trustee _____

Trustee _____

Trustee _____

Trustee _____

Trustee _____

Trustee _____

¹ **DISCLAIMER:** Please note that the sample report is provided for informational and illustration purposes only. Libraries should consult with their own library attorneys in complying with the Act and in preparing, adopting, and filing their own library reports.

Executive Director _____

Library Resident _____

Library Resident _____

Note: Per 50 ILCS 70/10(b), the committee membership must include all the elected or appointed members of the library board of trustees (President and Trustees), the Executive Director or other official of the Library, and two residents appointed by the Board President. The President may appoint more than two residents if deemed appropriate.

B. Dates that our Committee Met (50 ILCS 70/20)

First Meeting (must occur prior to June 10, 2023): _____

Second Meeting: _____

Third Meeting: _____

Additional Meetings (List All, if any): _____

IV. Core Programs or Services Offered by our Library

A. Our Library offers the following core services and programs:

B. Other core services/programs we could possibly provide:

V. Awards and Recognitions

Our Library has received the following awards, distinctions and recognitions:

VI. Intergovernmental Agreements

We partner with or have Intergovernmental Agreements with the following other governments
(list as many as you have):

Entity:	Services Offered:
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Our Library's efficiency has increased through intergovernmental cooperation in the following
ways (list cost savings, avoiding duplicated services, etc.):

VII. Community Partnerships

We partner with the following organizations (list as many as you have):

Organization:	Services Offered:
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

VIII. Review of Laws, Policies, Rules and Procedures, Training Materials, and other Documents

We have reviewed the following, non-exhaustive list of laws, policies, training materials, and other documents applicable to the Library in order to evaluate our compliance and to determine if any of the foregoing should be amended.

_____ State laws applicable to Libraries

- _____ Illinois Open Meetings Act (5 ILCS 120/1 *et seq.*)
- _____ Policy on public comment
- _____ Designation of OMA officer (5 ILCS 120/1.05(a))
- _____ All Board Members have completed OMA Training (5 ILCS 120/1.05(b))
- _____ Schedule of Regular Meetings of the Library Board (5 ILCS 120/2.03)
- _____ Illinois Freedom of Information Act (5 ILCS 140/1 *et seq.*)
- _____ Designation of FOIA Officer (5 ILCS 140/3.5(a))
- _____ FOIA Officer Training (5 ILCS 140/3.5(b))
- _____ Computation and Retention of FOIA Requests (5 ILCS 140/3.5(a))
- _____ Posting Other Required FOIA Information (5 ILCS 140/4(a); 5 ILCS 140/4(b))
- _____ List of Types or Categories of FOIA Records under Library Control (5 ILCS 140/5)
- _____ Periodic Meetings to Review Closed Meeting Minutes (5 ILCS 120/2.06(d))
- _____ IMRF Total Compensation Postings (5 ILCS 120/7.3)
- _____ Designation of Whistleblower Auditing Official (50 ILCS 105/4.1 *et seq.*)
- _____ All applicable officials have filed statement of economic interests (5 ILCS 420/4A-101; 5 ILCS 420/4A-101.5 *et seq.*)
- _____ Sexual harassment prevention training (775 ILCS 5/2-109(C))
- _____ Our Intergovernmental Agreements
- _____ Our budget and financial documents
- _____ State Ethics Laws, including, but not limited to the State Officials and Employees Ethics Act (5 ILCS 430/1-1 *et seq.*)
- _____ Our budget and financial documents

_____ Reports on government efficiency, including “Local Government Efficiency and Size in Illinois: Counting Tax Revenues, Not Governments” by Wendell Cox (2016);

_____ Others (*List Below or Attach*):

IX. What Have We Done Well? (List any budget/levy freezes or reductions in the past decade; list new programs or services offered to residents over the past decade; list any ethics ordinances adopted; timely FOIA compliance; responsiveness to public; list any new intergovernmental agreements; list any increase in number of library patrons served, etc.)

X. What Inefficiencies Did We Identify/What Are our Next Steps?

XI. What Can We Do Better or More Efficiently?

XII. Studies on Governmental Efficiencies

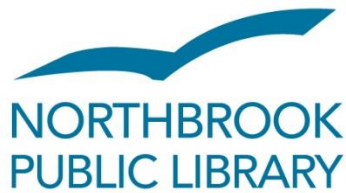
In preparing this report, we reviewed several studies on local government efficiency. These studies show that the average local government in Illinois serves 1800 residents compare to the national median of 2850 individuals.

XIII. Our Committee's Recommendations Regarding Increased Accountability and Efficiency:

Note: This Report must be filed with the county (or counties) no later than 18 months after the first committee meeting.

Submitted by: _____
Chairman, Decennial Efficiency Committee

Date of Committee Approval of Report: _____



Memorandum

DATE: April 14, 2023

TO: Board of Trustees

FROM: Kate Hall, Executive Director

RE: Strategic Plan Proposals Review

We received seven proposals from strategic plan consultants:

- Constructive Destruction
- DeEtta Jones and Associates
- Essentiam Strategy
- Fast Forward Libraries
- ReThinking Libraries
- Sarah Keister Armstrong & Associates, LLC
- The Ivy Group, Ltd.

Copies of all the proposals are included in the packet along with a cost breakdown, proposal review rubric, and an overview of each proposal's process. For the rubric, the proposals were scored based on the following identified criteria:

- Experience working with libraries or other nonprofit organizations
- Responsiveness of the written proposal to the purpose and scope of the project
- Demonstrated knowledge, skills, and experience in conducting strategic planning projects
- Proven methodology for gathering data from stakeholders to inform strategic plan goals and objectives.
- Experience in utilizing a sustainability and EDI framework to gather information and assess needs.
- Proximity / ability to work with the library both in person and virtually
- Background and area of expertise that align with our community and organizational needs
- Ability to meet deadlines and operate within budget
- Flexibility and willingness to customize consultation and support provided to our specific organization

I recommend that the board choose two to three consultants to bring back to interview at the May meeting. I am preparing a list of questions which I will share prior to this month's board meeting for the board's review and discussion.

Consultant Cost Overview	Total Cost	
DeEtta Jones and Associates	\$95,000	
Constructive Destruction	\$60,380	
The Ivy Group, Ltd.	\$43,991	\$57,166
Fast Forward Libraries	\$29,400	
ReThinking Libraries	\$26,300	\$33,600
Essentiam Strategy	\$26,100	
Sarah Keister Armstrong & Associates, LLC	\$21,500	

DeEtta Jones and Associates

Launch the Strategic Planning Process		
Environmental Scan		
Shared Values		
Strategic Directions and Change Agenda		
Strategic Plan Creation		
TOTAL	\$95,000	

Constructive Destruction

Background Research	\$8,540	
Internal Engagement	\$13,160	
Community Engagement	\$13,860	
Writing, Reporting, Presenting	\$11,620	
Project Management	\$13,200	
TOTAL	\$60,380	

The Ivy Group, Ltd.

Kickoff + Community Profile	\$3,875	
Library Environment Assessment	\$3,875	
Planning Session Visit #1	\$5,170	
Community Leader Interviews	\$1,240	
Community Online Survey	\$6,200	
Market Segmentation	\$8,386	
Implementation Workshop Visit #2	\$6,720	
Plan Development	\$8,525	
<u>Optional Services</u>		
Board Member Interviews		\$3,875
Community Conversations Visit #1		\$7,750
Final Presentation Virtual		\$1,550
TOTAL	\$43,991	\$57,166

Fast Forward Libraries

Learn	\$15,700	
Dream	\$6,900	
Do	\$6,800	
TOTAL	\$29,400	

ReThinking Libraries

Overall Project Management / Virtual Kickoff Meeting/ (Required)	\$3,200	
Data Gathering and Analysis: (Required but adjustable)	\$3,200	\$5,400
Staff and Community Focus Group Facilitation (Required but adjustable)	\$4,500	\$6,400
Online Survey Design, Deployment, and Analysis (Recommended)	\$5,100	\$5,700
Strategic Retreat (Required)	\$5,300	
3-5 Year High-Level Plan Development (Recommended)	\$1,900	
12-Month Work Plan Development Assistance (Recommended)	\$500	\$1,900
Expected Expenses:	\$2,600	\$3,800
TOTAL	\$26,300	\$33,600

Essentiam Strategy

Community Engagement	\$13,250	
Strategic Planning Workshops	\$15,750	
Plan Documentation	included above	
Subtotal	\$29,000	
Discount	\$2,900	
TOTAL	\$26,100	

Sarah Keister Armstrong & Associates, LLC

Data Collection + Assessment	\$9,500	
Strategic Plan Creation	\$9,000	
Implementation + Evaluation	\$3,000	
TOTAL	\$21,500	

DeEtta Jones and Associates**\$95,000**

DeEtta Jones
 Dr. Maggie Cousin
 Tyler Dzuba

Our goal is to facilitate critical conversations related to the current reality and future of libraries. We understand that public libraries are at a significant moment of redefinition, strengthened by an esteemed past and transforming in ways that are substantive and meaningful for today’s communities and cultures. The most impactful changes are not reactionary or episodic; they are intentional, ongoing, and organization-wide, strengthening strategy, systems, and culture within an organization while simultaneously building individual knowledge, and skills. This deliberate and ongoing effort to enhance the Library’s people, systems, and culture is what we refer to as building organizational capacity: the focus of DJA’s philosophy and of our service and product offerings.

Description of the methodology	List of Tasks	Project Timeline
1. Launch the Strategic Planning Process	Form a Strategic Planning Team to work with DJA, create a process framework that ensures broad membership engagement and process transparency.	Months 1-2
2. Environmental Scan	Conduct assessment of library’s environment and organization using focus groups, survey, and data analysis comprised of library users, non-users, and stakeholders (including board and staff).	Months 3-6
3. Shared Values	Provide SWOT analysis of factors such as services, perception, inclusion, and more.	
	Facilitate an examination of peers and trends. Create a process that communication with stakeholders and clarifies priorities.	
	Facilitate activities that engage stakeholders, staff, members, and community in defining the mission of the library, surfacing shared vision and values, including an actionable commitment to Equity, Diversity and Inclusion (EDI) while aligning with organizational priorities and activation practices.	Months 7-8
4. Strategic Directions and Change Agenda	Facilitate development of change agenda, and identification of strategic directions that will advance the organization toward vision as well as a “plan of service” to consider new organizational structures and revenue models.	Months 9-10

5. Strategic Plan Creation	Create a final strategic plan with measurable objectives, goals, and measures that are actionable, enable implementation, and ongoing communication.	
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Constructive Destruction

\$60,380

Stephanie Chase Judah Hamer

We pool our knowledge and experience in the belief that collaborators with different viewpoints support organizations to create the most meaningful plans. We facilitate a strongly collaborative, community-based approach that is co-created with your input and leadership throughout. The main focus of Constructive Disruption is to ensure sustainability by unlocking organizational and stakeholder priorities so libraries may carry forward diverse, equitable, and inclusive strategic endeavors for years to come. Our focus is on co-creation and partnership.

We recognize that public libraries need plans that are authentic and meaningful. We partner with you in a way that places a value on existing strengths while also identifying opportunities for the kinds of changes that will help your library maintain its vibrancy and relevance over time. A strengths-based, human-centered approach sets our consultancy work apart. We view our work through a lens of equity, diversity, and inclusion to ensure many disparate voices are heard throughout the process, so that the resulting plan and related action steps serve all.

Equity, diversity and inclusion (EDI) work is an essential component of library services, programs and operations -because the communities libraries serve are increasingly diverse. This effort can mean convening conversations and engaging in dialog that is at times discomfoting. Sincerely doing EDI work will build authentic relationships across all the segments of the community a library serves. It is through these relationships that libraries will take an active part in ending systemic racism and injustice.

Description of the methodology	List of Tasks	Project Timeline
1. Background Research	Demographic & geographic analysis of service area	July
	Environment analysis (competitive landscape analysis)	
	Community mapping	August
	Review of existing data	September
	Community mapping follow-up research	October
2. Internal Engagement	Assessment of library's internal competencies	October
	Strategic Plan Committee formation	July
	Strategic Plan Committee kick off meeting	
	Strategic Plan Committee support	August
	Two (2) Town Halls	
	Revision of Mission and Vision Statements	September
	Strategic Plan Committee support	
Strategic Plan Committee support, including in-person planning retreat	October	
Review/revision of Core Values		
3. Community Engagement	Strategic Plan Committee support	November-January
	Survey research and development	July
	Survey drafting (15 structured questions + 1 open-ended question)	
Board meeting attendance — overview of project		

	Two (2) rounds of survey edits Interview preparation for stakeholder interviews	August
	Survey release Survey data analysis (September-October) Community stakeholder interviews (completed by SPC members) Focus group configuration Focus group preparation Five (5) Focus groups	September
	Town hall preparation Two (2) community halls Town hall data analysis Interview data analysis Focus group data analysis	October
4. Writing, Reporting, Presenting	Presentation of survey results	October
	Draft strategic plan including NPL's priorities, goals, objectives and activities for the overall library service model over the coming 5 years, including collections, programming, technology staffing and facilities Analytic report — synthesis of data yielded from all community engagement Presentation of analytic report	November
	Presentation of draft strategic plan "Did we get it right?" Two (2) staff town halls "Did we get it right?" Two (2) community halls Two (2) rounds of edits to strategic plan, based on feedback from presentations Presentation of strategic plan to the committee of the whole (incl. preparation) Presentation of strategic plan at the February 2024 Board meeting (including preparation)	December- January
5. Project Management	General management, coordination & scheduling Bi-weekly check-ins and communication with NPL project manager/leadership	July- January

Julia Prince

Sarah Hamfeldt

Mark Parlette-Carino

Kathy Kildea

Ivy Group understands PL's desire to push the Library forward and respond to pandemic-related changes in ways that make the greatest impact possible. We prioritize capturing perspectives from across various community groups to create a plan that improves standards for programs, collections, and services that are fiscally responsible and culturally responsive.

At The Ivy Group, our hallmarks are:

- Comprehensive research and analysis. As one recent client put it, "What set you apart was how you were approaching finding out about the community by attacking it from multiple levels...A true deep dive."
- Community engagement which builds support for and use of library services. This includes engaging non-users and populations which might traditionally be underrepresented or underserved, to provide a basis for increasing participation and equity.
- A planning process which fosters internal know-how and cohesion. We know how to navigate complex relationships, turn insights into action, and build consensus.
- Forward-thinking and actionable plans. We understand how to make plans that are both innovative and practical, and we work closely with your team members to get deliverables done on time and as promised.

We stand apart from other consultancies because we know libraries and understand their need to secure a path to sustainability and success in a fast-changing world. Since The Ivy Group's founding in 1989, we have collaborated with a variety of library organizations to develop effective strategies, plus branding, marketing, and outreach programs that address their unique challenges.

Description of the methodology	List of Tasks	Deliverables	Project Timeline
1. Discovery	Project Kick Off & Community Profile	Summary Memo with Community Profile executive summary of themes	July
	Library Environmental Assessment	Insights from this assessment will be in the final strategic plan	July- August
	Board Interviews (optional)	Summary memo with executive summary of themes	July- August
	Planning Session Visit #1		August
2. Community Assessment	Community Conversations Visit #1 (optional)	Summary memo of key themes	August
	Community Leader Interviews	Summary memo of key themes	August-October
	Online Survey	Survey report and data tables	September- November
	Market Segmentation	Market Segmentation report	September- November

3. Planning	Implementation Workshop Visit #2	Implementation dashboard	November
	Plan Development	Strategic plan with executive summary, project methodology,	November-January
	Final Presentation (optional)		February

Fast Forward Libraries

\$29,400

Amanda Standerfer, MA, MLIS

This proposal details a grounded research planning process that will result in a focused, actionable 3–5-year strategic plan for NPL. The Fast Forward Libraries team has extensive experience working with public libraries and strives to be a neutral process facilitator and partner to maximize community and stakeholder input, reflection, learning, and plan operationalization so the resulting strategic plan is compelling, responsive, and focused. We are steeped in organizational development methods and group dynamics, both essential elements of the strategic planning process. We specialize in processes leading to a graphical one-page strategic plan (see examples provided), which is vital for community and stakeholder communication and a visual reminder of the strategic direction during the life of the plan.

In our approach, we use:

- Systems thinking - considering individual aspects of the library, how they interrelate, and what this means for overall dynamics and potential levers for change.
- Design thinking - putting humans as the core of the library's work.
- Adaptive action - the simple framework of what? so what? now what? grounds us in inquiry throughout the process. By coming back to this framework throughout the process, we can be iterative in our learning that will inform final plan documents.
- Diversity, equity, and inclusion - DEI is a critical foundational lens that is applied throughout the process.

Description of the methodology	List of Tasks	Deliverables	Project Timeline
1. Learn	Form the Planning Team Library Strategic Capacity Assessment and Leadership Team Retreat Community Needs Assessments and Focus Groups & Interviews Gather Community Feedback and Conduct Research	Learning Report with all external and internal data gathered and analyzed	July-October
2. Dream	Board Retreat Session Staff Retreat Session(s) Leadership Team Retreat	Library Strategic Capacity Report summarizing SOAR	November-December
3. Do	Draft and Revise plan documents Solicit staff feedback Solicit board feedback Develop Implementaiton Guide Create Decision Making Matrix and sort initiatives into "core, strategic, or culture)	One page graphical plan Strategic Plan Document Implementation Guide: Activity Plan, Evaluation Framework, and	January-February

ReThinking Libraries

\$26,300-\$33,600

Rob Cullin

Janet Nelson

Randy Maxey

RTL has two overriding philosophies that drive our vision for successful and dynamic strategic planning for future-ready libraries:

1. Robust community input from library users, non-users, community leaders, staff, and board members based on aspirational discussions instead of problem-focused dialogue. Though we don't formally call this Appreciative Inquiry, many of the premises and approaches are similar.
2. A final plan that is dynamic and easy to "live." The plan must maintain a certain level of flexibility, while still being measurable, to address the shifting landscape facing today's public libraries.

Our methodology centers on the previously mentioned philosophies and helps organizations build both a strategic framework and a more strategic-minded culture. We incorporate research and analysis of existing data with direct staff and user input gathered through community engagement sessions, online surveys, and one-on-one discussions.

Description of the methodology	List of Tasks	Project Timeline
1. Conduct a Kickoff Meeting and Establish a Timeline		July
2. Review and Analyze Data and Information		August- September
3. Gather & Analyze Stakeholder Input	Community/Stakeholder Engagement Planning and Promotion	September
	Staff, Board, and Friends Sessions and Interviews	September
	Community/Stakeholder Engagement Sessions and Surveys	October
4. Develop and deliver the "Findings Book"		November
5. Facilitate a Strategic Planning Retreat		November
6. Develop a high-level 2-6 page Strategic Plan		November-December
7. Assist the library planning team with the creation of a detailed Work Plan		January

Deliverables

- A detailed community analysis including demographics and mapping of key social indicators/measurements
- Organizational and community assessments
- A multi-cohort comparison benchmark analysis of primary library metrics, regional, state, national and “best-in-class”
- Collection utilization analysis (turnover and relative use)
- Compiled notes from stakeholder sessions, online survey, etc., which will include key priorities and goals emerging from these inputs and summaries where appropriate
- Outputs from Strategic Retreat including analysis, ideation, and voting exercises
- A 2-6-page high-level Strategic Plan focusing on the top 4-6 priorities coming out of the process.

Stephanie Kusibab Jami Yazdani

Essentiam is a woman-owned strategy consultancy based in the Chicagoland area. Our team brings deep understanding and knowledge of libraries from the inside, as well as expertise in strategic planning. We have conducted quantitative and qualitative research and led strategic planning for more than 20 years across a wide variety of public, private, nonprofit, and governmental sectors. This breadth of experience with mission-based organizations allows us to bring fresh thinking to NPL while staying grounded in the unique realities of libraries. We are expert facilitators of community engagement initiatives including virtual and in-person conversations as well as quantitative research surveys.

Knowing that no two organizations or engagements are exactly alike, we are committed to working closely with your team to ensure a customized planning process that aligns with your culture and exceeds your expectations. The overarching framework for this work is threefold We first look to understand the current state of the organization and its marketplace context through a situational review and stakeholder input. Second, we work with organizational leaders to explore and identify a vision of the future they are excited to help create. And then, the strategic plan is built as a bridge to help move from today to tomorrow in a structured and impactful way.

Recognizing the importance of justice, diversity, equity, and inclusion (JEDI) in all its forms, we take great care to ensure all members of your community feel welcome and valued throughout the planning process. We understand JEDI as a long-term journey that is never complete, it requires openness as well as awareness and a willingness to meet organizations and communities where they are while striving to improve. Our facilitators have helped lead JEDI initiatives at several organizations and regularly attend educational and dialogue sessions on these topics to continue their own personal journey and learn from others.

Description of the methodology	List of Tasks	Deliverables	Project Timeline
1. Community Engagement	Interviews	Overview and Relevant findings from community engagement research	July-October
	Focus Groups		
	Survey		
	Planning Questionnaire		
2. Strategic Planning Worksho	series of virtual and in-person meetings with a combination of board and key staff members		October
3. Plan Documentation	Plan Refinement with Staff and Key Leaders	Strategic Plan Document with 3-5 High Level Goals	November-January
	Development of Final Draft Plan	Strategy on a Page	
	Plan Presentation to the Board	Implementation Toolkit	
	Providing two rounds of review, input, and changes	Assessment Tool	
	Providing a final strategic plan document		

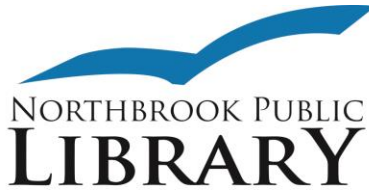
Sarah Keister Armstrong
 Dan Armstrong

Sarah Keister Armstrong + Associates, LLC is a small, family-owned business that specializes in needs assessments and strategic planning, program evaluation, and communications for public libraries and nonprofit organizations. We embrace data and its value to telling an organization’s story, communicating its impact, and identifying ways to improve upon its work. Our approach to project management

- actively engages those meaningfully influenced by the project
- includes regular communication with project leads, and
- results in high-quality products that help organizations chart meaningful progress for the future.

Our philosophy as a firm is to be lean, results-focused, efficient, and effective for our clients. In working with public and nonprofit institutions, we maintain a strong commitment to fiscal responsibility and accountability to the stakeholders of the organizations we assist. We examine all aspects of projects through an equity lens.

Description of the methodology	List of Tasks	Deliverables	Project Timeline
1. Data Collection + Assessment	Preliminary Data Analysis	Up to Date Community Profile	July-August
	Informational Interviews with Board	Written report detailing findings from each part and an executive summary of overarching trends	
	Survey of Library Staff		
	Listening Sessions with Community Partners		September-October
	Survey of Residents Served by NPL		
2. Strategic Plan Creation	Facilitate Planning Session I	Comprehensive strategic plan with exec summary	November
	Facilitate Planning Session II	Detailed outline of next steps	December-January
	Staff Feedback		
	Wrap-Up Session		
3. Implementation + Evaluation	Develop an evaluation and communications plan	Written evaluation plan that supports the priority areas lded in the strategic plan	February
	Submit finalized strategic plan documents to library	Raw and summary data	



1201 Cedar Lane • Northbrook, IL 60062 • 847.272.6224 • www.northbrook.info

STRATEGIC PLANNING SERVICES RFP COVER SHEET

Name: Stephanie Chase

Organization: Constructive Disruption, LLC

Email: sayhey@constructivedisruption.info Phone: 971-444-9231

Address: 3711 NE 8th Avenue

City/State/Zip code: Portland, OR 97212

Checklist:

- A list of key personnel
- A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in strategic planning.
- A work plan that includes
 - a description of the methodology,
 - list of tasks,
 - project timeline, and
 - estimated total amount of time that would be spent on the project.
- Exclusions or exceptions.
- A schedule of costs that includes
 - consulting,
 - supplies,
 - number of onsite and virtual visits and cost per trip, and
 - other costs associated with the planning process.
 - data gathering and analysis (community research component) must be listed separately.
- List of 2-3 references of libraries or nonprofits who have been your clients within the last three years, including names, contact information



NORTHBROOK PUBLIC LIBRARY STRATEGIC PLAN

**PREPARED BY CONSTRUCTIVE DISRUPTION
APRIL 2023**

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Appendix

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COVER LETTER

Thank you for the opportunity to share with you our approach to the research, conversation, partnership, and planning that fosters positive outcomes for libraries.

Constructive Disruption is a woman-owned LLC partnership based in Oregon. Founded in 2019, Constructive Disruption is a cooperative effort involving library consultants located across the country with disparate and complementary areas of expertise. We pool our knowledge and experience in the belief that collaborators with different viewpoints support organizations to create the most meaningful plans. We facilitate a strongly collaborative, community-based approach that is co-created with your input and leadership throughout.

The main focus of Constructive Disruption is to ensure sustainability by unlocking organizational and stakeholder priorities so libraries may carry forward diverse, equitable, and inclusive strategic endeavors for years to come. Our focus is on co-creation and partnership. If you believe your organization's greatest asset is its people, we're the consulting group for you.

Constructive Disruption is distinct from its peers because we develop plans that are individualized, impactful, and resonate for all involved. Our process is different than the decades-old ALA *Planning for Results* approach, because we recognize that public libraries need plans that are authentic and meaningful. We partner with you in a way that places a value on existing strengths while also identifying opportunities for the kinds of changes that will help your library maintain its vibrancy and relevance over time.

A strengths-based, human-centered approach sets our consultancy work apart. At the heart of Constructive Disruption LLC is a group of dedicated professionals with a shared passion for libraries and the communities they serve. We hope to share that passion with you.

Signature:



Stephanie Chase

Date: April 10, 2023

Title: Founding Principal

EXECUTIVE SUMMARY

Constructive Disruption proposes that we facilitate an engaged planning process that relies on collecting community aspirations, analyzing all available data, and leveraging staff experience and knowledge for a robust and realistic strategic plan. We view our work through a lens of equity, diversity, and inclusion to ensure many disparate voices are heard throughout the process, so that the resulting plan and related action steps serve all. An intended by-product of our process are new and renewed professional and community networks for participants. These connections will pave the way for the successful partnerships necessary to meet the goals of the new strategic plan.

Our process for Northbrook will be comprised of four interconnecting parts:

- Background research
 - demographic & geographic analysis and community profile;
 - environmental assessment of internal competencies and staff capacity;
 - community mapping;
 - review of existing plan and other data.
- Community Engagement
 - We facilitate engagement using methods that reach far into the community.*
 - focus groups;
 - community town halls;
 - stakeholder interviews;
 - community survey.
- Internal Engagement (Staff, Leadership, Board)
 - Our highly collaborative approach relies on forming an active and involved Strategic Planning Committee and engaging with staff, advocates, and stakeholders.*
 - SPC to lend input for community mapping, provide feedback on data analysis, represent and share perspectives of other staff and Board members, communicate to peers about and during the process, and co-create plan language;
 - focus groups for staff, stakeholders, and Board members;
 - bi-weekly check-ins and communication with the project manager/leadership.

- Writing, Reporting, and Presenting

We see these activities as key to communicating during the process and eliciting feedback that shapes the final form of the plan.

- revising the Vision and Mission statements and Core Values;
- writing an analytic report that synthesizes data from internal/external engagements;
- drafting the strategic plan, including priorities, goals, and measurable objectives;
- co-developing action plans with staff for the first plan year;
- presenting internally and externally the plan and related deliverables.

We manage coordination of these four interconnecting parts and their related activities throughout the process. This process was designed specifically for Northbrook Public Library and is not a cookie-cutter product. We are flexible in our approach and can accommodate additions and revisions to the process prior to initiating it, or as it unfolds.

KEY PROJECT PERSONNEL

Stephanie Chase's (she/her) roles for this project include qualitative data collection and analysis, facilitator, stakeholder and community engagement, writer. She started Constructive Disruption in 2019.

Qualifications include:

- Former library director
- Current Executive Director for a 15-county, 40-member library resource sharing cooperative
- Deep experience in strategic planning and evaluation in the government sector
- Founder of two non-profits, including one developed as a statewide library resource sharing organization.

Related experience

- More than a decade in municipal government leadership, including serving as a department head.
- Over 20 years of experience managing, supporting, participating in, and leading boards, including advisory and governing Boards of Trustees.
- Founder of two non-profits, including one developed as a statewide library resource sharing organization and one as a national advocacy organization.
- Extensive national and international facilitation and presentation experience.
- Member of the Public Library Association Board of Directors and the American Library Association's governing Council.



A full resume for Stephanie can be found in the appendix.

KEY PROJECT PERSONNEL

Judah Hamer's (he/him) roles for this project include project management, quantitative and qualitative data analysis, background research, stakeholder and community engagement, writer. Judah began working as a Lead Consultant with a focus on data and data analysis with Constructive Disruption in 2021.

Qualifications include:

- Strategic planning & change management expertise
- Operational and project management skills
- Developing internal and external communications, especially those linked to data analysis
- Expert in both qualitative and quantitative modes of data analysis
- Areas of specialization: social interaction, knowledge management, organizational development.

Related experience

- Former library director.
- Currently Vice President of Human Resources & Operations at Bandujo Advertising + Design, a full-service advertising and digital agency.
- Instructor at School of Communication & Information, Rutgers University.

A full resume for Judah can be found in the appendix.



QUALIFICATIONS & RELEVANT EXPERIENCE

With decades of planning and evaluation experience, Constructive Disruption brings deep knowledge in engaged, participatory processes that lead to useful and meaningful plans. Previous projects include:

Springfield Public Library and History Museum, Oregon. Throughout late 2022 and early 2023, Stephanie and Judah supported library and museum staff and stakeholders in the development of a new strategic plan that encompassed both organizations, which serve a community of approximately 60,000.

Massachusetts Library System, Massachusetts.

Throughout summer and fall 2020, Stephanie led the member engagement in and staff development of the system's strategic plan. The final version of the plan can be found at https://guides.masslibsystem.org/ld.php?content_id=61738916.

Reaching Across Illinois Library System [RAILS], Illinois.

In 2021 and into early 2022, Stephanie led the development of the RAILS strategic plan. As a resource-sharing member cooperative with statutory responsibilities, member engagement and the evaluation and assessment of current activities was a key part of the process. The final approved version of the plan can be found at <https://railslibraries.org/about/strategic-plan>.

Santa Clara County Library District [SCCLD], California.

Throughout 2022 and 2023, Stephanie and Judah, working with four additional consultants, led the development of the SCCLD strategic plan. SCCLD has 8 locations, over 10+ million loans annually, and a service population of nearly 500,000; the project included significant staff engagement and support through multiple rounds of virtual and in-person sessions. The final approved version of the plan can be found at <https://scclld.org/strategic-plan/>.

WORK PLAN: PREFACE

At Constructive Disruption we bring a set of tools to background research, community and internal engagement, along with data analysis. This preface describes the perspective through which these tools are deployed.

Truly Reflective Services

Contemporary library services, programs, and operations should reflect the wants, needs, and aspirations of communities served. Being outward-facing is more than a fad; it is how libraries and information agencies will remain vibrant and necessary for years to come.

Equity, Diversity, and Inclusion is Essential

Equity, diversity and inclusion (EDI) work is an essential component of library services, programs and operations -because the communities libraries serve are increasingly diverse. This effort can mean convening conversations and engaging in dialog that is at times discomfoting. Sincerely doing EDI work will build authentic relationships across all the segments of the community a library serves. It is through these relationships that libraries will take an active part in ending systemic racism and injustice.

Prioritizing Self-Service, Community-Based, and Alternative Services

North America is in catch-up mode when it comes to self-service and other formats for connecting our community members with library services. Around the world these models are norms:

- within our own facilities; self-service, pop-up, and partnership based service models;
- co-located services in our libraries and communities, in partnership with schools, local government services, and community partners; and,
- connecting community members with our services through alternative means.

WORK PLAN: METHODS

At Constructive Disruption, our research and planning processes are built with a collaborative approach at the center. We believe high-quality, sustainable plans emerge when diverse staff, key leadership, and local stakeholders have a meaningful opportunity to contribute their thoughts and create an all-inclusive exchange where views are recognized, respected, and value. We see every engagement as an opportunity to learn.

Background Research

Constructive Disruption will begin the process of data gathering with a conversation with the Northbrook Public Library team. This is an opportunity to understand jointly what reports, documents and existing plans already exist and are useful for informing next steps. Examples are: existing plans, annual reports, budgetary details, an organizational chart and job descriptions.

Constructive Disruption also taps external data sources, such as the U.S. Census and the Pew Research Center reports, to inform its research. Overlaying all of this is a deep dive into Northbrook as a community, to understand the context in which the library functions. For instance, the goals/plans of partner organizations and/or local departments often impact the decisions a library makes.

This background research, along with the data and learning that emerges from community engagement, are an opportunity to move beyond implicit assumptions and expectations about the people who live in Library's service area and how they are best served.



WORK PLAN: METHODS

In library service, we often fall prey to serving the customer profile we interact with the most, a version of the canonical “library patron” – or, perhaps, the squeakiest wheel. If we hyper-focus on services that map onto this type of customer experience, we lose the opportunity to explore equitable practices to reach the under-served and under-represented communities we interact with most. We lose perspective on the ways in which library services fit – or do not fit – into the everyday lives of our users. In support of this perspective, Constructive Disruption will review and incorporate work from the EDI After Action Report from The Blackberry Collection and any quantitative analysis done with Lily Zheng into the community profile, library assessment, analysis report, and strategic plan as appropriate.

Community Engagement

Our approach to community engagement will take the format of: focus groups, town halls, stakeholder interviews, and a community survey. Within the architecture of these formats, we apply inclusive engagement techniques such as:

- The International Association for Public Participation (IAP2)’s Public Participation Pillars;
- Harwood Institute tools of engagement, including the Turning Outward process;
- A range of brainstorming methods, giving ample opportunity for individual and group, verbal and non-verbal, and written and kinesthetic options for contributions. A particular favorite is the World Café method;
- Community mapping to determine who we need to talk with and identify gaps in that stakeholder list, ensuring a diverse and inclusive list of participants;
- Principles of Design Thinking, including empathy/ecosystem mapping, customer journey mapping, directed storytelling interviews, and prototyping;
- Passive collection: post-its, dotting, or other individually interactive methods;
- Asset Based Community Development;
- Government Alliance on Race and Equity (GARE)’s toolkits.

These methods are effective in both virtual and in-person settings.

WORK PLAN: METHODS

As we engage both the community and your staff, we will be modeling ways to create open dialog and facilitate conversations to maximize participation. We will also be explaining why we approach things the way we do. For example, in reviewing the draft community survey we will take time to explain the structure and logic of questions. The goal is for you always to understand the reasoning behind our approach to data collection.

A great outcome of this collaborative and inclusive approach is that it will build staff capacity for ways to engage the community and potential partners. Community engagement invariably supports directions for a library's next chapter. It will also highlight areas for further exploration, and we want your staff to have the tools to pursue this.

Internal Engagement

Our approach to internal engagement will involve a Strategic Planning Committee. Through a series of interlocking community and internal engagements over the course of the entire planning process, we ensure that the strategic plan is on the right track as it is formed. This approach upholds our commitment to all participants by demonstrating to them how their efforts and contributions shape the plan.

Strategic Planning Committee. This group is a key mechanism for internal engagement. Members are integral to providing background information for the planning process. Their perspectives will help inform the content of the plan. They will be among the first to review draft reports and documents; take part in engagement opportunities; connect and communicate with colleagues; encourage participation; and assist with drafting select plan elements. We estimate that members of this committee will need to give approximately 12-15 hours per month over the 8-month project period. Together we will set a schedule of meetings for this Committee.

Working with Stakeholders. We suggest community members who are library

WORK PLAN: METHODS

advocates, governmental partners, elected/appointed officials, and others be included throughout the process. This should include focus groups for the Board and for stakeholder groups, and might include inviting stakeholders to work alongside the Strategic Planning Committee in any or all of the following five meetings:

- A review of internal documents and gathered data;
- Revision of the Vision and Mission Statements;
- Review of Core Values;
- A brainstorming session to identify library service priorities, goals, objectives, and activities;
- A review of the draft strategic plan, along with related documents such as the analytic report, environment analysis, and assessment of internal competencies and capacity.

A lasting outcome of the participation of the Strategic Planning Committee and stakeholders is that this project provides another opportunity to build and strengthen relationships across the library staff, advocates, elected and appointed officials, diverse community leaders, local partners, and other key individuals.

Writing, Reporting, Presenting

Throughout the planning process we synthesize background research along with data from community and internal engagements. The learning, themes, and findings that emerge are presented to leadership and the Strategic Planning Committee. This inclusive approach to reporting on analysis provides an opportunity to test priorities, goals and measures of success to refine them and ensure they resonate.

WORK PLAN: METHODS

When drafting the strategic plan itself, we will partner directly with leadership and the Strategic Planning Committee. Our outlook is that staff need to be directly involved in order to develop a realistic and actionable future-focused plan, one that is aspirational and at the same time do-able.

This means that community engagement remains at the strategic level. This approach to handling the development of the plan's action items helps to manage any unrealistic or unsustainable community expectations for specific activities that are presented. At the same time the process ensures that the plan accurately reflects community aspirations and needs.

We have included in the scope of work developing an action plan for the first year of the plan period. As part of the measurement and evaluation process, libraries typically find a need to calibrate their execution of action steps – especially if these involve multi-year implementation. Our approach will provide the Northbrook staff a framework for revisiting action steps on an annual basis. An annual check-in about the implementation of the strategic plan will support flexibility and responsiveness to external circumstances that may arise and impact next steps.

Hybrid Approach to Engagement

We will discuss with you an approach to balancing both in-person and virtual opportunities for engagement that feels right for Northbrook. Meeting face to face offers unique and powerful ways to connect at the start of a collaborative relationship.

In terms of the array of engagements, a major lesson learned from the COVID-19 pandemic for strategic planners and the institutions they serve is that both in person and virtual formats are effective. In-person activities can limit access for possible participants whose lives don't allow them to participate at specific times, in specific locations. Virtual options remove that barrier and allow for collection of ideas and opinions from a more diverse pool of community members and stakeholders.

TASKS & TIMELINE

JULY

Background Research

- Demographic & geographic analysis of service area
- Environment analysis (competitive landscape analysis)

Internal Engagement

- Strategic Plan Committee formation
- Strategic Plan Committee kick off meeting

Community Engagement

- Survey research and development
- Survey drafting (15 structured questions + 1 open-ended question)
- Board meeting attendance – overview of project

Project Management

- General management, coordination & scheduling
- Bi-weekly check-ins and communication with NPL project manager/leadership

AUGUST

Background Research

- Community mapping
- Review of existing data

Internal Engagement

- Strategic Plan Committee support
- Two (2) Town Halls

Community Engagement

- Two (2) rounds of survey edits
- Interview preparation for stakeholder interviews (*to be held by the end of September*)

TASKS & TIMELINE

AUGUST (cont'd)

Project Management

- General management, coordination & scheduling
- Bi-weekly check-ins and communication with NPL project manager/leadership

SEPTEMBER

Background Research

- Community mapping follow-up research

Internal Engagement

- Revision of Mission and Vision Statements
- Strategic Plan Committee support

Community Engagement

- Survey release
- Survey data analysis (*September-October*)
- Community stakeholder interviews (*completed by SPC members*)
- Focus group configuration
- Focus group preparation
- Five (5) Focus groups
 - Attendance at September Board meeting

Project Management

- General management, coordination & scheduling
- Bi-weekly check-ins and communication with NPL project manager/leadership

TASKS & TIMELINE

OCTOBER

Background Research

- Assessment of library's internal competencies

Internal Engagement

- Strategic Plan Committee support, including in-person planning retreat
- Review/revision of Core Values

Community Engagement

- Town hall preparation
- Two (2) community halls
- Town hall data analysis
- Interview data analysis
- Focus group data analysis

Writing, Reporting, Presenting

- Presentation of survey results

Project Management

- General management, coordination & scheduling
- Bi-weekly check-ins and communication with NPL project manager/leadership

NOVEMBER

Internal Engagement

- Strategic Plan Committee support

Writing, Reporting, Presenting

- Draft strategic plan including NPL's priorities, goals, objectives and activities for the overall library service model over the coming 5 years, including collections, programming, technology staffing and facilities
- Analytic report – synthesis of data yielded from all community engagement
- Presentation of analytic report

TASKS & TIMELINE

NOVEMBER (cont'd)

Project Management

- General management, coordination & scheduling
- Bi-weekly check-ins and communication with NPL project manager/leadership

DECEMBER AND JANUARY

Internal Engagement

- Strategic Plan Committee support

Writing, Reporting, Presenting

- Presentation of draft strategic plan
- "Did we get it right?" Two (2) staff town halls
- "Did we get it right?" Two (2) community halls
- Two (2) rounds of edits to strategic plan, based on feedback from presentations

Project Management

- General management, coordination & scheduling
- Bi-weekly check-ins and communication with NPL project manager/leadership

Writing, Reporting, Presenting

- Presentation of strategic plan to the committee of the whole (incl. preparation)
- Presentation of strategic plan at the February 2024 Board meeting (including preparation)

BUDGET: OVERVIEW

Below is a summary of the schedule of costs for project components, along with estimated hours to complete each. **The total cost for this proposal is \$60,380.**

	Hours	Cost
Background Research		\$8,540
Demographic & geographic analysis of service area	13	\$1,820
Environment analysis (competitive landscape analysis)	13	\$1,820
Community mapping	6	\$840
Community mapping follow-up research	2	\$280
Review of existing data	10	\$1,400
Assessment of library's internal competencies	17	\$2,380

	Hours	Cost
Internal Engagement		\$13,160
Strategic Plan Committee Formation	4	\$560
Strategic Plan Committee kick-off meeting (in person)	8	\$1,120
Strategic Plan Committee support	30	\$4,200
Strategic Plan Committee retreat (in person)	24	\$3,360
Revision of Mission and Vision Statements	10	\$1,400
Review and refresh of Core Values	10	\$1,400
Two (2) Town Halls	8	\$1,120

	Hours	Cost
Community Engagement		\$13,860
Five (5) Focus groups (includes attendance at September Board meeting)	10	\$1,400
Focus group preparation	3	\$420
Focus group configuration	3	\$420
Focus group data analysis	3	\$420
Two (2) community halls	8	\$1,120
Town hall preparation	3	\$420
Town hall data analysis	4	\$560

BUDGET: OVERVIEW

Community Engagement, continued

Interview preparation for stakeholder interviews	4	\$560
Interview data analysis	7	\$980
Survey research and development	12	\$1,680
Survey drafting (15 structured questions + 1 open-ended question)	10	\$1,400
Two (2) rounds of survey edits	7	\$980
Survey release	5	\$700
Survey data analysis	20	\$2,800

Writing, Reporting, Presenting

\$11,620

Draft strategic plan including WPL's priorities, goals, objectives and activities for the overall library service model over the coming 5 years, including collections, programming, technology staffing and facilities	15	\$2,100
Analytic report - synthesis of data yielded from all community engagement	25	\$3,500
Two (2) presentations of survey results / analytic report	10	\$1,400
Two (2) rounds of edits to strategic plan, based on feedback from presentations	7	\$980
Presentation of draft strategic plan	4	\$560
"Did we get it right?" Two (2) staff town halls	6	\$840
"Did we get it right?" Two (2) community halls	6	\$840
Presentation of strategic plan to the committee of the whole (incl. preparation)	6	\$840
Presentation of strategic plan to the Board	4	\$560

Project Management

\$13,200

General management, coordination & scheduling	48	\$3,600
Bi-weekly check-ins and communication with NPL project manager/leadership	48	\$3,600
Travel (two in-person trips)		\$6,000

\$60,380 TOTAL

BUDGET: SCHEDULE OF COSTS

Hourly Rates: Consulting \$140/hour
Project Management \$75/hour
Travel per diem is: \$125 per day per person

All travel and lodging are billed at cost, with a budgeted amount of up to \$6,000 to support travel. As proposed, this includes the following in-person sessions:

- Kick off for the Strategic Planning Committee (Stephanie)
- Overview for the Board (SPC kick off to be scheduled to coordinate with this meeting)
- A full-day in-person retreat for the Strategic Planning Committee (Stephanie and Judah).

A commitment to planning and confirming in-person meetings at the start of the project will ensure travel can be value-engineered effectively and may open the possibility to additional in-person opportunities.

EXCLUSIONS, EXCEPTIONS, & ASSUMPTIONS

The following exclusions, exceptions and assumptions have been factored into this proposal:

- **Engagement in languages other than English.** Constructive Disruption can coordinate with the Northbrook Public Library staff to support engagements in languages other than English, including translating the survey and other deliverables. Should Northbrook prefer, Constructive Disruption will hire its own translator at a rate of \$75/hour.
- **Edits & Revisions.** Constructive Disruption will ask Northbrook Public Library to identify a staff member who will consolidate all suggestions for various edits made by staff to the survey and strategic plan. Additional rounds of edits and revisions beyond what is outlined in the scope of work will be billed at \$150/hour.
- **Survey.** If the survey is to be released in multiple languages, Northbrook Public Library will provide Constructive Disruption access to a SurveyMonkey account at the Team Premier subscription level (\$225 per month) for the duration of the project.

REFERENCES

Monica Harris, Executive Director

Reaching Across Illinois Library System (RAILS)

125 Tower Drive, Burr Ridge, IL 60527

monica.harris@railslibraries.info

630-734-5129

Stephanie led the large-scale engagement effort with RAILS staff, Board, and member libraries to facilitate the development of a member-informed strategic plan. RAILS serves 1,300 member libraries in urban, suburban, and rural areas in northern Illinois. This process was conducted virtually due to the COVID-19 pandemic.

Justin Keeler, Outreach and Community Partnerships Director, Project Lead, Strategic Planning Process

Fort Vancouver Regional Libraries

11818 SE Mill Plain Blvd, Suite 415, Vancouver, WA 98684

jkeeler@fvrl.org and swallin@fvrl.org

360-906-5000

In partnership with Justin Keeler and Sam Wallin, Stephanie led a large-scale engagement effort with FVRL staff, stakeholders, and partners, and facilitated the development of a member-informed, co-created strategic plan for the system. FVRL's service area covers more than 4,200 square miles and provides service in four counties in urban, suburban, and rural settings. This process was conducted virtually due to the COVID-19 pandemic.

Jennifer Weeks, County Librarian

Santa Clara County Library District (SCCLD)

1370 Dell Ave., Campbell, CA 95008

jweeks@sccl.org

(408) 293-2326 ext. 3001

Stephanie and Judah facilitated a large-scale engagement effort with SCCLD staff, stakeholders, and partners, and facilitated the development of a co-created strategic plan for the system. SCCLD's service area population is 447,541. Its annual circulation exceeds 10 million loans, and the system has 8 locations. This process was conducted in-person and virtually.

APPENDIX A: RESUMES

Please see the following pages for the resumes of
Stephanie Chase and Judah Hamer



Stephanie Chase

Leader + Innovator

Stephanie Chase

3711 NE 8th Ave
Portland, OR 97212

971/444.9231

stephanie.d.chase@gmail.com

<https://www.linkedin.com/in/stephaniedchase/>

<https://twitter.com/acornsandnuts>

Experience

Libraries of Eastern Oregon / Executive Director

2020-PRESENT, BAKER CITY, OR

Provides coordinating leadership support for the 40-plus member libraries serving Oregon's counties east of the Cascades.

Constructive Disruption / Founding Principal

2019-PRESENT, PORTLAND, OR

Consultancy focused on supporting the government sector in organizational development and design, workplace culture and transformation, creating and supporting high performing teams, transition and change management and support, strategic planning, innovative work practices, and hiring and recruitment practices to support a diverse, inclusive, welcoming culture.

City of Hillsboro / Director of Libraries

2014 - 2020, HILLSBORO, OREGON

Responsible for the leadership of the library services department of the City of Hillsboro; member of the City of Hillsboro Senior Leadership Team. Highlights include redefining the library's customer services model and the organizational restructure of 72 FTE from a traditional, hierarchical model to a horizontal model, focusing on strengths-based leadership and participatory culture. Managed a departmental budget of over \$11 million.

BiblioCommons / Strategist

2013-2014, TORONTO, ONTARIO

Developed client support strategies for the over 200 organizations part of the global BiblioCommons community, including training, development, documentation, and B2B communications.

The Seattle Public Library / Director of Library Programs and Services

2012-2013, SEATTLE, WASHINGTON

Responsible for the division charged with the entirety of direct public services for the 26 location system from service design to personnel to collection costs. Spearheaded an organizational restructure covering approximately 650 staff in partnership with organized labor. Managed the divisional budget of over \$60 million as well as supporting the expenditure of a \$129 million tax levy.

**Experience,
continued**

**Multnomah County Library / Reference, Adult Services, and
Programming Coordinator**

2010-2012, PORTLAND, OREGON

Led the division responsible for coordinating services to adults, including direct information services, programming and outreach, and staff training. Partnered with organized labor to redefine direct information service staff positions.

PRIOR WORK EXPERIENCE includes nearly a decade of work as a department director in small and rural municipalities in Vermont and New Hampshire, including Stowe, Vermont, Marlborough, New Hampshire, and Westford, Vermont.

**Committee and
Board Work**

Public Library Association / Board of Directors

2017-PRESENT

Currently serves on the governing board for the Public Library Association, the largest trade organization for public librarians in the United States. Acts as the Association's representative on Council, the governing and policymaking body for the 50,000 member American Library Association. Involved with committee work in the Public Library Association since 2009.

LibraryReads / Founding member, inaugural Board Chair

2012-2018

As a founding member, worked closely with the five largest publishers in the United States to illuminate the role of libraries in the reading and author discovery market. Responsible for leading LibraryReads through the federal incorporation process to become a 501(c)4 as well as hiring the organization's first staff, including an Executive Director. The organization's model has since been replicated in Australia and in Canada.

Green Mountain Library Consortium / Founding President

2008-2013

Founded the consortium in 2007 to provide coordinated statewide digital services, including a statewide open source project. Responsible for leading the organization through the process to become a 501(c)3.

Education

Pratt Institute / Master of Library and Information Science

1999-2000, New York, NY

Summa Cum Laude honors

University of New Hampshire / Bachelor of Arts, English

1995-1998, Durham, NH

Summa Cum Laude honors



JUDAH HAMER

Strategy. Operations. Messaging.

PROFESSIONAL EXPERIENCE

CONTACT ME

📞 802-989-2793
✉️ jshamer@gmail.com
📍 Provincetown, MA
New York, NY
Miami, FL

AREAS OF EXPERTISE

Strategic planning & change management expertise with deep experience in the research, engagement, and analysis it takes to develop impactful plans grounded in the reality of an organization. I thoughtfully study organizational culture and systems, then facilitate, support and/or lead change among internal and external stakeholders.

Project management & operations skills with a proven ability to assess workflows at the macro & micro levels and to identify internal assets and opportunities. I collaboratively create systems and workflows, then work within them as part of project management and execution.

Develop internal & external communications with ease. I've mastered creating content and writing copy in various formats and channels, for distinct target audiences and purposes. Includes: training materials, technical writing, social media, websites, and quantitative/qualitative analytic reports. I confidently present material in person and remotely.

CONSTRUCTIVE DISRUPTION Portland, OR (2021 to present)
Consult with clients on future-focused strategy for local government and libraries.

Lead Consultant (2021 to Present)

- Develop and conduct surveys; analyze results.
- Integrate and synthesize qualitative and quantitative data.
- Prepare research reports and presentations in various forms for different target audiences.
- Create work proposals, public bids, project budgets and timelines.
- Complete market research for current and target customers.

BANDUJO ADVERTISING + DESIGN New York, NY (2020 to present)
Handled all aspects related to human resources, operations, coordinating technology needs and upgrades. Collaboratively developed messaging, copy, wireframes.

Vice President, Operations & Human Resources

- Developed operational assessment to restructure and enhance departmental workflows and communication.
- Coordinated the build-out of technological infrastructure and processes to support asset tracking.
- Recalibrated the agency's knowledge and content management systems.
- Recruited new talent from national and international pools. Handled hiring and on-boarding.
- Advised and implemented benefits administration, employee evaluation and retention.
- Authored campaign messaging and below-the-fold copy.
- Wireframed websites and landing pages.

RUTHERFORD PUBLIC LIBRARY, Rutherford, NJ (2011-2020)

Director

Provided leadership for all aspects of operations and community services.

- Transformed a dated profile of services to revitalize Library's profile.
- Overhauled staffing and operations to stabilize finances and create fiscal sustainability.
- Project-managed 25,000 sq. ft interior renovation.
- Reconceived technical infrastructure to support high levels of public access to technology.
- Handled all aspects of human resources in union and civil service environment.
- Coordinated development/fundraising across governing board and two 501©3 support groups.
- Awarded State of New Jersey Joint Legislative Resolution in recognition of the Library's transformation. (2016)

SKILLS

Strategic planning

Operational evaluation

Staffing analysis

Workflow design

Knowledge & content
management

Data analysis

Message development

Copy & report writing

Recruitment & retention

Teaching & training

Non-profit & local government
experience

Budgeting, financial stewardship

RUTGERS UNIVERSITY, New Brunswick, NJ & Remote (2002-present)
Instructor, Masters Program, School of Communication & Information
Design and deliver Masters-level courses in online and on-campus formats.
(TA, 2002-2004)

- Awarded *Faculty of the Year Award for Excellence in Online Education* from Web-based Information Science Education (2007).
- Recognized with a Dept. of Library & Information Science Teaching Assistant Award. (2004)
- Reconceived on-campus courses in an online format as the School built its online degree program.
- Design and teach these courses in the Masters in Information Science program.
 - Human Information Behavior
 - Reference Services & Sources
 - Children's & Youth Services
 - Information Seeking & Using: How Young People Use E-information

ILSLEY PUBLIC LIBRARY, Middlebury, VT (2009-2011)
Head of Youth Services

Updated traditional youth services department, sustaining legacy services while also creating a community-focused profile of programs and activities.

- Increased summer reading program registration by 18% and overall program attendance by 56% over two years.
- Recalibrated programming to serve youth and their families more inclusively.
- Designed new layout for collections to enhance the customer experience.
- Supervised and managed the workflow of departmental employees and volunteers.
- Led outreach initiatives to schools, daycares, and other youth-serving agencies.

EDUCATION

Masters in Information Science
Rutgers University, NJ
4.0 GPA

Bachelor of Arts, English
Montclair State University, NJ
Magna cum Laude

RUTLAND FREE LIBRARY, Rutland, VT (2006-2009)
Assistant Director

Handled all aspects of daily operations and fiscal management within a complex structure of financial support.

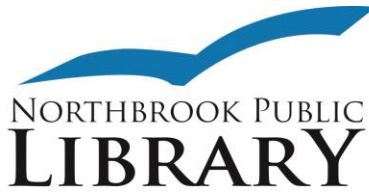
- Collaboratively re-developed budget to align disbursements with endowment restrictions.
- Integrated the Library into the City of Rutland's *Creative Economy* approach to urban renewal.
- Co-founded a Statewide Library Cooperative (Green Mountain Library Consortium) to provide for delivery of e-content.
- Supervised departmental employees, volunteers, and independent contractors.
- Monitored and coordinated upgrades, support, and maintenance of technical infrastructure.

SUMMARY OF PRIOR POSITIONS

Rutgers University, New Brunswick, NJ 2002-2005
Teaching Assistant, Instructor, PhD Candidate.

Bergen County Cooperative Library System (BCCLS), NJ 2000-2002
Young Adult Services Coordinator

Woodcliff Middle School, Woodcliff Lake, NJ 1996-2000
Librarian/Media Specialist



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STRATEGIC PLANNING SERVICES RFP COVER SHEET

Name:

Organization:

Email:

Phone:

Address:

City/State/Zip code:

Checklist:

- A list of key personnel
- A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in strategic planning.
- A work plan that includes
 - a description of the methodology,
 - list of tasks,
 - project timeline, and
 - estimated total amount of time that would be spent on the project.
- Exclusions or exceptions.
- A schedule of costs that includes
 - consulting,
 - supplies,
 - number of onsite and virtual visits and cost per trip, and
 - other costs associated with the planning process.
 - data gathering and analysis (community research component) must be listed separately.
- List of 2-3 references of libraries or nonprofits who have been your clients within the last three years, including names, contact information



NORTHBROOK PUBLIC LIBRARY

DeEtta Jones

NEXT GENERATION
GLOBAL LEADERSHIP



DeEtta Jones & Associates: Our Experience



**DeEtta Jones
Founder & CEO**

DeEtta Jones & Associates (DJA) is a Black, woman-owned management consulting and training firm that guides leaders and organizations on a journey that builds capacity, strengthens innovation, and increases organizational performance by creating a more diverse, equitable, diverse, and inclusive EDI environment.

DJA has nearly 20 years working with Libraries to create custom EDI training and strategies both organization wide and at the leadership level. We've worked with over a **hundred libraries, both nationally and internationally**, and developed **dozens upon dozens of strategic plans**. A leader in library organizational development, we bring deep subject matter expertise, contemporary best practices, highly skilled facilitators, engaging virtual design and technology, as well as tools for practical application and implementation.

Our experience, expertise and deliberate strategies and tools will position the Northbrook Public Library (NPL) for success in developing a **comprehensive strategic plan** incorporating community and stakeholder feedback. Specifically, we bring deep subject matter expertise, contemporary best practices, highly skilled facilitators, engaging virtual design and technology, as well as tools for practical application.

We have a wealth of professional development tools, including online courses that are offered to thousands of people annually, that reflect current and emerging needs of sophisticated managerial and EDI capacity within and across organizations. All deliverables are jam-packed with concepts, resources, and tools for immediate and practical application. **We help you learn what, why and HOW to integrate contemporary best practices into NPL.**



Sample of Clients



Meet Our Team



DeEtta Jones
Founder & CEO



Dr. Maggie Cousin



Dr. Jerome Offord, Jr.



Tyler Dzuba



Dr. Myra Henry



Annie Bélanger



Nyasha Guramathunhucooper



Katrina Johnson



Melissa Lamson



Michelle Simmons



Molly McInerney



Trevor A Dawes



Vanessa Seals



Dr. Kyle Oldham



Dr. Cori Wong



Dr. Edward Scott, Jr.



Emad Rahim



Aisha Thomas



Holly Brittingham



Dr. Nichole Garcia



Gary Wasdin



Lori Cawthorne



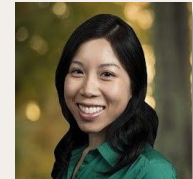
Maisha Carey



Cynthia McKee



Renee Boddie



Carolyn Embuscado



Dawn Reid



Sarah Segura



Joy Ntetha



Lexi Seals-Johnson



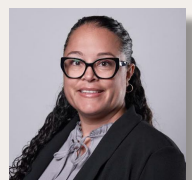
Dr. Jessica Guzman-Rea



Santoshi Goyal



Lynn Son Kee



Misty Resendez



Mesha Mott



Dr. Lizzie Bronte

Our Approach

We believe that all individuals and organizations are on an EDI journey. Our goal is to meet you where you are and design a custom path forward.

Avoidance

Focused on diversity only; preventing harassment; trying to hire from a diverse pool of candidates



Awareness

Listening to more key stakeholders, enabling dialogue about difficult topics; EDI initiatives begun at a local or unit level; no comprehensive EDI strategy



Adoption

Leaders understand and believe in the benefits of EDI, but EDI strategy is often reactive and standalone



Integration

Embed EDI in the work, develop EDI capabilities; actively committed leadership; focus on inclusion; measure what matters and communicate results transparently



Transformation

EDI ecosystem, with EDI as part of the business strategy; partnerships, accountability at all levels; all processes are built with EDI as an outcome; sustainable



Sustainability

EDI Journey™

Note: Capabilities within each phase may build upon one another and are not mutually exclusive to a phase.

Varying levels of knowledge and skill within capabilities may exist in each phase of the journey.

A blurred background image of a business meeting. A woman in a white blazer is smiling and looking towards a man in a suit who is looking down at a laptop. They are seated at a table with papers and coffee cups.

Library Strategic Planning

Strategic Planning Approach

DeEtta Jones and Associates (DJA) is honored to submit this proposal for consulting services to design and facilitate the Northbrook Public Library's strategic planning process.

Northbrook Public Library Values: Innovation, Inclusion, Customer-focus, Lifelong Learning, Collaboration

At DJA, we believe that creating an inclusive environment strengthens innovation. This is why we center equity, diversity, and inclusion (EDI)at all points of the strategic planning process with the ultimate goal of infusing EDI in all levels of the organization and in its collaborations with the community.

The DJA Approach

Our goal is to facilitate critical conversations related to the current reality and future of libraries. We understand that public libraries are at a significant moment of redefinition, strengthened by an esteemed past and transforming in ways that are substantive and meaningful for today's communities and cultures. The most impactful changes are not reactionary or episodic; they are intentional, ongoing, and organization-wide, strengthening strategy, systems, and culture within an organization while simultaneously building individual knowledge, and skills. This deliberate and ongoing effort to enhance the Library's people, systems, and culture is what we refer to as building organizational capacity: the focus of DJA's philosophy and of our service and product offerings.

Building organizational capacity is the process of continually learning to change and thrive—bringing the library to the next level of strategic, operational, programmatic, and organizational maturity, in order to more effectively achieve its unique mission. In particular, equity, diversity, and inclusion present knotty issues that evade quick solutions. Many organizations attempt to “solve” EDI with short-term interventions or limited positions or committees; in our experience, enduring support of EDI begins with understanding our deeper cultures and backgrounds as ourselves, only then considering how to design structures and strategies that are undergirded by the culture we wish to embody.

Strategic Planning Work Plan Process

For NPL, DJA proposes a planning process with several core foundational elements that build upon and continuously inform each other. Each core element involves activities designed for significant engagement of key stakeholders in expressing ideas and creating change. DJA consultants will support the planning process in the following ways, with estimated time frames:

1) Launch the strategic planning process (Months 1-2)

- a) DJA consultants will assist in launching an EDI Strategic Planning Steering Committee (SPSC) and will facilitate discussions about overall desired outcomes, guiding principles for the planning process, Committee roles and responsibilities, and effective group process. DJA consultants will work with the Committee to construct a planning roadmap and timeline. DJA consultants will engage the Library's leadership and the SPSC in discussions about the process of gathering and synthesizing information, intended audiences for a written strategic plan document, and the most appropriate form and content of the written plan.
- b) DJA consultants will aid the SPSC to develop methods to regularly communicate with key stakeholders about progress and accomplishments.

2) Enable the Library community to surface shared values and to carry out an Environmental Scan, supported by DJA-led focus groups (Months 3-6)

- a) DJA consultants will facilitate, with the Executive Director and SPSC, an (possibly in-person) all-staff session to introduce the consultants and to provide an overview of the planning process to achieve a Library-wide understanding and build engagement and commitment.
- b) DJA consultants, in partnership with the SPSC, will facilitate all-staff shared values sessions, building upon work already done by the Library such as the EDI After Action Report, using large- and small-group activities to share key findings, engage Library colleagues in discussions about environmental scanning, and elicit ideas about the organizational EDI values and shared vision of the members of the NPL staff. DJA consultants will aid the SPSC to develop ways to communicate results of the Values sessions.
- c) DJA consultants will design and facilitate data gathering virtual sessions/focus groups for internal and external constituents. These focus groups will provide input to inform the EDI vision and strategic directions. Groups may include community members, City stakeholders, the Board of Trustees, and/or Library staff. DJA will prepare a summary report of data collected.
- d) In addition to the focus groups, DJA consultants will virtually guide the SPSC to scan the external environment in order to understand developing trends and needs around EDI that will provide the inspiration and rationale for future strategic directions. A choice of scanning methods will be reviewed with the SPSC by the consultants and the methods most appropriate to NPL will be selected by the Committee.

3) Facilitate the identification of EDI Strategic Directions (Months 7-8)

- a) DJA consultants will facilitate a (potentially in-person) strategic planning retreat with the Board of Trustees, Leadership, and the SPSC (as appropriate) to review findings to date and to gather the Board's input on areas of strategic focus in support of EDI.
- b) DJA consultants will guide the SPSC to craft strategic change agenda and to articulate high-level strategic directions for EDI, aligning with organizational priorities and local needs.
- c) DJA consultants will aid the Strategic Planning Steering Committee to develop ways to communicate results of the Strategic Directions sessions.

4) Support the development of a final EDI Strategic Plan and Implementation Plan (Months 9-10)

- a) DJA consultants will support the SPSC in developing a written EDI strategic plan in alignment with the strategic directions and visioning sessions. The SPSC will be responsible for writing the plan; DJA will review drafts and collaborate with the committee as desired. This will result in the delivery of a final draft for review by the Executive Director and Board of Trustees.
- b) With NPL, DJA will create an implementation plan and following by reviewing drafts. DJA will be available on a limited basis to support this following process and will be open to additional engagement as needed.

5) The result of the strategic planning process will be a written plan to guide the Library's future.

Strategic Planning 5 Step Process

Step 1: Launch Establish Structure Months 1-2	Step 2: Environmental Scan Months 3-5	Step 3: Shared Values Month 6	Step 4: Strategic Directions and Change Agenda Months 7-8	Step 5: Strategic Plan Months 9-10
<p>Form a Strategic Planning Team to work with DJA, create a process framework that ensures broad membership engagement and process transparency.</p>	<p>Conduct assessment of library's environment and organization using focus groups, survey, and data analysis comprised of library users, non-users, and stakeholders (including board and staff).</p> <p>Provide SWOT analysis of factors such as services, perception, inclusion, and more.</p> <p>Facilitate an examination of peers and trends. Create a process that communication with stakeholders and clarifies priorities.</p>	<p>Facilitate activities that engage stakeholders, staff, members, and community in defining the mission of the library, surfacing shared vision and values, including an actionable commitment to Equity, Diversity and Inclusion (EDI) while aligning with organizational priorities and activation practices.</p>	<p>Facilitate development of change agenda, and identification of strategic directions that will advance the organization toward vision as well as a "plan of service" to consider new organizational structures and revenue models.</p>	<p>Create a final strategic plan with measurable objectives, goals, and measures that are actionable, enable implementation, and ongoing communication.</p>
<p>Establish Scope, Structure and Team</p>	<p>Environmental Scan and Priorities</p>	<p>Articulating and Integrating Values</p>	<p>Change Agenda and Strategic Directions</p>	<p>Strategic Plan and Activation</p>

Key Personnel

DeEtta Jones, Founder and CEO, is a go-to strategist on equity, diversity, inclusion and workplace transformation. She brings 30 years of experience in libraries developing practical tools to build managerial effectiveness and making structural and sustainable organizational change. DeEtta believes that we are at a defining moment. Organizations and their leaders are being held accountable for new standards of equity, inclusion, and excellence. To this end, the most impactful changes are not reactionary or episodic: they are intentional, ongoing, and enterprise-wide; strengthening strategy, systems, and culture within an organization. DeEtta brings research-based rigor and knowledge of contemporary best practices to her clients. She presents to tens of thousands of people annually, working with hundreds of organizations across many industries, and around the world. DeEtta's years of experience as a management consultant, diversity and inclusion educator, organization development and training professional have led to her being one of the most sought after speakers and consultants in her field.

Dr. Maggie Cousin, Vice President for Client Engagement, creates and implements DJA's strategic vision, in particular, delivering the highest quality services and experiences to clients. Maggie is an experienced change agent with a passion for integrating EDI principles within organizational systems and helping companies and institutions strategize to build equity into their workplace culture. Maggie's background in EDI, qualitative research, and data analysis provides a unique perspective that allows her to transform complex topics into clear, innovative, strategic, and data-driven change initiatives. Maggie has more than a decade of experience developing and integrating EDI strategy in higher education, medical centers, not-for-profit, and community agencies. Her rich and practical experience includes working closely with leadership teams and organizational committees to build equity into vision, values, policies, practices, programs, spaces, and services.

Tyler Dzuba, Senior Consultant, is a librarian and experienced facilitator with passion for systems thinking, participatory design, leadership from all levels, and iterative improvement. He has facilitated workshops in a variety of contexts, both local and national, in support of organizational development, strategy, and personal vision. His background in data analytics, strategic planning, leadership and management practices, and organizational identity lend him unique perspective from multiple sectors. Tyler benefits from experiences in the library sector, healthcare information, and finance, which lend him a broad view of the challenges facing today's information professionals.

Additionally, our unparalleled reach into libraries also attracts superior subject matter experts with proven track records in the industry as consultants. Consequently, we employ 30-40 contractors with whom we have ongoing and flexible working relationships, allowing us to expand and contract based on the number and type of client engagements.

References

Jersey City Free Public Library (JCFPL)

Jeffrey Trzeciak (former Director, JCFPL | Current Executive Director, Dayton Metro Library)

JTrzeciak@daytonmetrolibrary.org

DeEtta Jones and Associates (DJA) conducted an intensive six-month strategic planning process comprised of several elements that built upon and continuously informed each other. Each core element involved activities designed for significant engagement of the Library's administration, staff, board members, and key stakeholders in expressing ideas and creating change. The result of JCFPL's planning process was a plan to guide the future, integrating contemporary trends and developments in public library service, the perspectives and needs of key JCFPL stakeholders.

Decatur Public Library

Rick Meyer

City Librarian

rmeyer@decaturlibrary.org

With the Decatur Public Library, DJA created an equity, diversity and inclusion (EDI) strategy and a diversity statement. Over the course of nine months, DJA designed and implemented a three-year action plan for the libraries. The development of the plan included an environmental and organizational audit; the creation of a strategic framework, diversity statement, and time-bound measurable goals; and an implementation plan with customized metrics.

University of Pennsylvania Libraries

Constantia Constantinou

H. Carton Rogers, III, Vice Provost and Director of Libraries

cc1@upenn.edu

DJA facilitated a 12-month strategic planning process for the University of Pennsylvania Libraries, which engaged a staff of 320 in creative visioning, gathered information from approximately 100 campus stakeholders, and set the Libraries on a path toward an inclusive and community-engaged future building on their successes.

These meetings created a series of recommendations, recommendations which later provided the foundation of a Mission Statement, Vision Statement, and a Strategic Plan created through an EDI lens.

Pricing

<p>Strategic Planning*</p> <p>Design and implementation of customized strategic planning process for Northbrook Public Library.</p> <p>This includes:</p> <ul style="list-style-type: none">● Establish Guiding Team● Environmental Scan to include a review of recent focus group data and other documentation, 3-4 Focus Groups, a Survey, and Data Analysis● Articulate Shared Values and Position to Drive Activation● Create Change Agenda and Identify Strategic Directions● Produce Strategic Plan	
<p style="text-align: right;"><i>Total</i></p>	<p>\$95,000</p>

*Travel expenses additional



Learn More about DJA Programs & Services

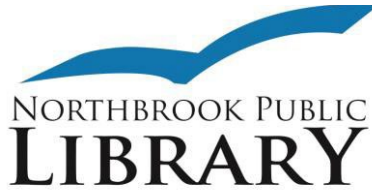


DeEtta Jones

NEXT GENERATION
GLOBAL LEADERSHIP

Empowering leaders to build and
sustain inclusive culture.

www.DeEttaJones.com



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STRATEGIC PLANNING SERVICES RFP COVER SHEET

Name: Stephanie A Kusibab

Organization: Essentiam LLC

Email: skusibab@EssentiamStrategy.com

Phone: 312-343-0074

Address: 5214 N. Olcott Avenue

City/State/Zip code: Chicago, IL 60656

Checklist:

- A list of key personnel
- A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in strategic planning.
- A work plan that includes
 - a description of the methodology,
 - list of tasks,
 - project timeline, and
 - estimated total amount of time that would be spent on the project.
- Exclusions or exceptions.
- A schedule of costs that includes
 - consulting,
 - supplies,
 - number of onsite and virtual visits and cost per trip, and
 - other costs associated with the planning process.
 - data gathering and analysis (community research component) must be listed separately.
- List of 2-3 references of libraries or nonprofits who have been your clients within the last three years, including names, contact information



NORTHBROOK PUBLIC LIBRARY

PROPOSAL FOR STRATEGIC PLANNING

April 10, 2023

Presented by:
Essentiam
www.essentiamstrategy.com

Stephanie Kusibab
CEO & Principal Consultant
5214 N. Olcott
Chicago, IL 60656
312.343.0074
skusibab@essentiamstrategy.com



Executive Summary

At Essentiam, we believe the most powerful ideas come from bringing people together. By creating deliberate, structured interactions to engage stakeholders from across your ecosystem, we mine diverse perspectives to generate new ideas, understand market opportunities, and coalesce your community around high impact strategies. We accelerate growth and mission achievement by creating and articulating strategies that resonate internally as well as externally.

Understanding of the Project: The Northbrook Public Library (NPL) is seeking a consultant to assist the library in developing a comprehensive strategic plan incorporating community and stakeholder feedback. NPL is a well-known library on the Northshore of Chicago in an affluent, well-educated community. The library is a central gathering place for students and adults of all ages and an important resource for the community. The library’s current strategic plan was for 2018-2021 and progress against it was interrupted due to the COVID-19 pandemic. That said, the library made good progress in accomplishing the goals set out in that plan. Given changes in the world and the community over the past three years, NPL would like to create a new plan, informed by community input, that will generate momentum and help the library maintain its award-winning status.

Qualifications: Essentiam is a woman-owned strategy consultancy based in the Chicagoland area. Our team brings deep understanding and knowledge of libraries from the inside, as well as expertise in strategic planning. We have conducted quantitative and qualitative research and led strategic planning for more than 20 years across a wide variety of public, private, nonprofit, and governmental sectors. This breadth of experience with mission-based organizations allows us to bring fresh thinking to NPL while staying grounded in the unique realities of libraries. We are expert facilitators of community engagement initiatives including virtual and in-person conversations as well as quantitative research surveys. We have hosted these types of open and honest conversations for clients across a wide spectrum of industries, professions, and institutions. Our range of recent experience includes completing a 9-month research, strategic planning, and implementation planning process for the Young Adult Library Association (YALSA), and an internal strategic planning process for the Rockford Public Library. Additional experience and references can be found on pages 10-13.

Process Overview: Based on our previous experience working with mission-driven organizations, we have developed a recommended process that is inclusive, engaging, and impactful. The process incorporates extensive community and stakeholder input, strategic planning, and plan documentation in a three-phased approach as depicted below. Further details on each component of the process can be found beginning on page 4, but we remain open to modifying the process based on your needs and expectations.



Outcomes: Through our work together, NPL will review its mission, vision, and values and adopt a new 3–5-year strategic plan to guide activities for future success. The new strategic plan will prioritize opportunities in the form of goals and objectives with related activities that form a clear path for your team. This plan will allow organizational leaders and staff members to focus energy and resources on the most important strategies for ongoing success and guide day-to-day decision making. The strategic plan will be documented in PowerPoint, Excel, and a graphical, easy to share strategy-on-a-page format. We will then translate the plan into an Implementation Toolkit for the library to track and measure success.

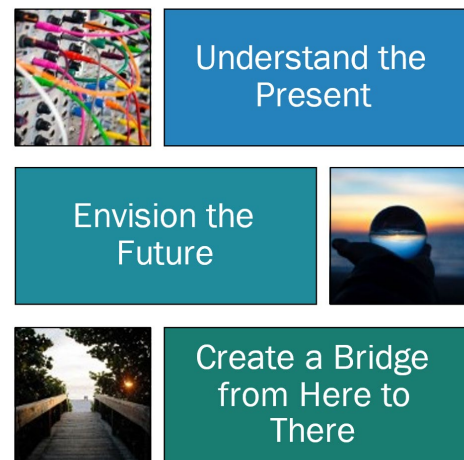
Through the discovery and community engagement process, we will update your community profile based on available demographic and usage data, identify community markets, and complete an assessment of key aspects of the library’s services and position.

Our Approach

Our Approach

Knowing that no two organizations or engagements are exactly alike, we are committed to working closely with your team to ensure a customized planning process that aligns with your culture and exceeds your expectations. We are confident that together we can identify the opportunities ahead, put a plan in place to achieve them, and engage your stakeholders in the journey.

The overarching framework for this work is threefold (see figure at right). We first look to understand the current state of the organization and its marketplace context through a situational review and stakeholder input. Second, we work with organizational leaders to explore and identify a vision of the future they are excited to help create. And then, the strategic plan is built as a bridge to help move from today to tomorrow in a structured and impactful way. By better understanding where you are today and where you want to go tomorrow, we are able to put a strategic plan in place that increases impact and enables moving confidently forward with purpose and focus.



Essentiam Strategic Planning Approach

Equity, and Inclusion

Recognizing the importance of justice, diversity, equity, and inclusion (JEDI) in all its forms, we take great care to ensure all members of your community feel welcome and valued throughout the planning process. We understand JEDI as a long-term journey that is never complete, it requires openness as well as awareness and a willingness to meet organizations and communities where they are while striving to improve. Our facilitators have helped lead JEDI initiatives at several organizations and regularly attend educational and dialogue sessions on these topics to continue their own personal journey and learn from others. While we are organizational strategists, not JEDI consultants, over the past five years we have regularly facilitated conversations on these topics as

part of strategic planning engagements with clients at all stages of their JEDI and anti-racism journeys.

We would welcome the opportunity to partner with Lily Zheng should you choose to engage them in a potential quantitative assessment. We follow Lily on LinkedIn and are connected through several circles. If you are contemplating a survey as part of that project, we may even be able to coordinate some of the questions to provide deeper insights for both EDI and strategic planning.

Planning Process Work Plan

Recognizing the unique aspects of your work and constituents, we will take time to fully understand the organization and community. While we will collaborate with the NPL team to ensure an approach and facilitation plan that reflects your unique culture, structure, and desired outcomes, based on our current understanding of your organization and needs, we recommend the following three-phased approach:



Community Engagement and Situational Review

For over 20 years, we have led market research engagements both as principal investigators and as clients. These two unique vantage points have led us to always start with the end in mind, crafting questions carefully to ensure they generate actionable insights.

Prior to hosting strategy workshops or fielding any research, the consultants will work with the NPL leadership team to understand the current state, get oriented to your community, and review provided background materials. Relevant materials may include the website, promotional collateral, previous strategic plan documents, program surveys, collected patron comments, utilization reports, financial and operating results, and demographic data. Based on the information reviewed, Essentiam will develop a situational assessment and community profile to help guide NPL and inform the strategic planning process.

We will gather input through direct staff, board, patron, community, and other stakeholder engagement. We will work with the NPL leadership team to refine our research plan, but currently

envision it including the following:

Interviews

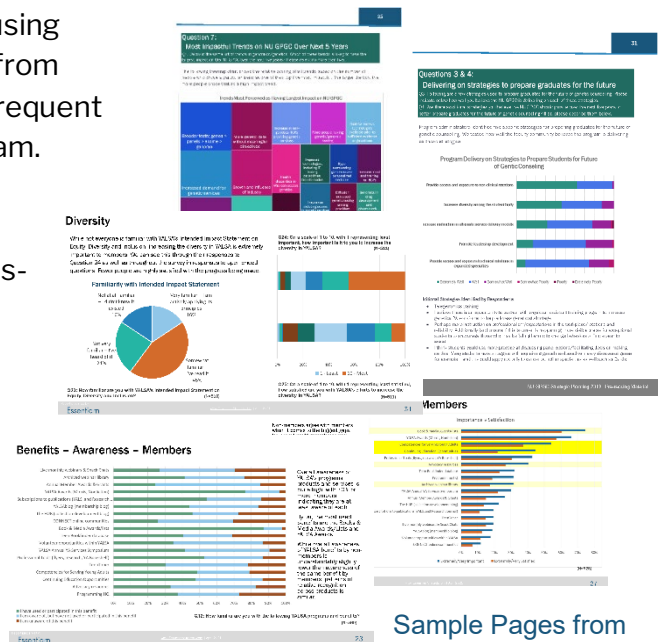
Conducting phone or Zoom interviews allows us to quickly gain qualitative insights from key stakeholders and community partners. We envision conducting interviews with several board members, volunteers, and staff at the onset of the project to help deepen our understanding of opportunities and issues to explore. We can also host small group interviews of 2-3 affiliated leaders from public agencies or other funders to expand internal perspectives and help generate insights on emerging challenges and opportunities.

Focus Groups

Hosting virtual and in-person focus groups allows us to gather qualitative feedback from a variety of stakeholders in a comfortable group format. Group discussions allow us to hear from a cross section of constituents, identify areas of common concern/opportunity, dig deeper into issues identified through discovery, and generate insightful feedback and idea sharing. In conducting similar focus groups for other clients, we have found that participants enjoy these conversations and appreciate the opportunity to hear the perspectives of their peers. Hosting at least some of the focus groups virtually makes participation more convenient for working people, parents of young children, and those who are mobility challenged or time constrained, allowing us to attract a broader audience than may be able to attend an in-person session. We recommend using focus groups as the means of gathering input from specific patron groups (i.e. teens, volunteers, frequent library users) as well as your extended staff team.

Survey

Gathering quantitative input from a broad cross-section of the public in advance of a strategic planning process provides important context and helps inform strategic conversations, especially related to satisfaction and potential opportunities to better serve the community. In advance of the strategy workshop, we propose conducting an online survey designed to reach as many constituents as possible. Questions will be crafted to gauge satisfaction and perceived importance of service areas as well as to identify important attitudes and perspectives of constituents related to the current state and future priorities. Questions for this survey will be written by the consultants in conjunction with NPL leaders. Keeping the time commitment manageable for participants will be an important aspect of survey design. Communication about the survey will be drafted by consultants and distributed by NPL staff through its existing communications channels. We will also leverage our personal networks in the area to



Sample Pages from Research Reports

encourage participation in the survey. Essentiam will code, host, and analyze the online survey.

Planning Questionnaire

Prior to the strategy workshops, Essentiam will ask for qualitative input from the core planning team in the form of a brief pre-workshop questionnaire. This qualitative input will be collated, summarized, and provided to all participants for review in advance of the workshops. Sharing input in this manner stimulates thinking on strategic subjects, allows participants to articulate their initial observations, identifies areas of common and divergent views, and creates a baseline of understanding from which to build consensus during the workshop. Allowing for this form of feedback encourages everyone to openly share their perspectives and captures rich ideas from which to start our in-person conversations.

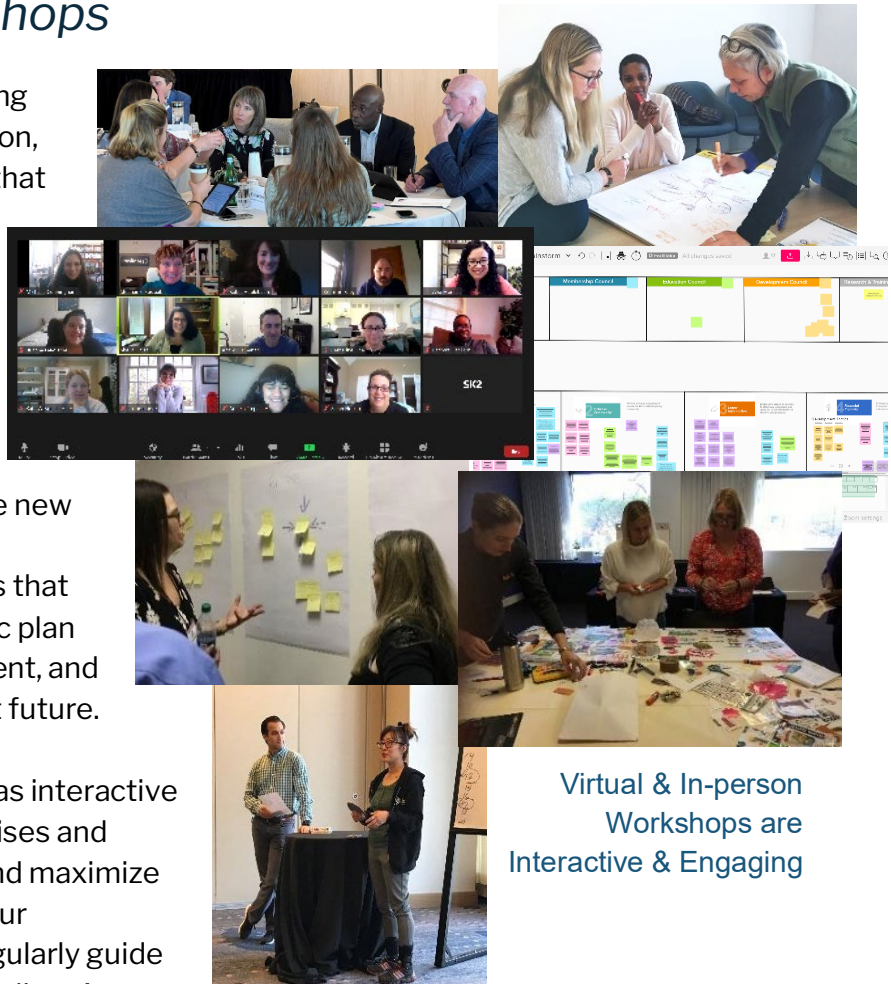
An overview and relevant findings from the community engagement/research will be collated and delivered in a pre-reading packet to NPL leaders and the core planning team in advance of the strategic planning workshop(s).

Strategic Planning Workshops

Creating a truly strategic plan and reviewing the direction contained in the mission, vision, and values statements is important work that requires dialogue and discussion at the highest levels of an organization informed by community stakeholders.

Allowing for sufficient, structured dialogue and discourse helps to build relationships, find and prioritize opportunities, and encourage buy-in to the new plan. Our collaborative process engages stakeholders through a series of exercises that build on one another to develop a strategic plan that honors the past, builds from the present, and stretches the organization toward a bright future.

Essentiam approaches strategy sessions as interactive workshops. We intentionally design exercises and frame questions to engage participants and maximize opportunities for generative discussion. Our consultants are expert facilitators who regularly guide high stakes conversations in person and online. An outline of discussions for NPL would likely include:



Virtual & In-person Workshops are Interactive & Engaging

- Assessing the current state of the organization
- Defining a desired future state
- Identifying organizational strengths and brainstorming opportunities
- Shaping opportunities into strategies
- Articulating NPL’s service priorities
- Refining strategies with clearly articulated outcomes
- Reviewing and refining NPL’s vision, mission, and values statements

We anticipate these conversations taking place through a series of virtual and in-person meetings with a combination of board and key staff members. The workshops ensure plenty of focused time for strategic conversations and collaboration to identify and prioritize the high-level components of the strategic plan. Combining virtual and in-person meetings allows us to spend the necessary time in generative conversation while making it more convenient for your busy team to participate. We will work with NPL leadership to determine the right mix of in-person and virtual workshops.

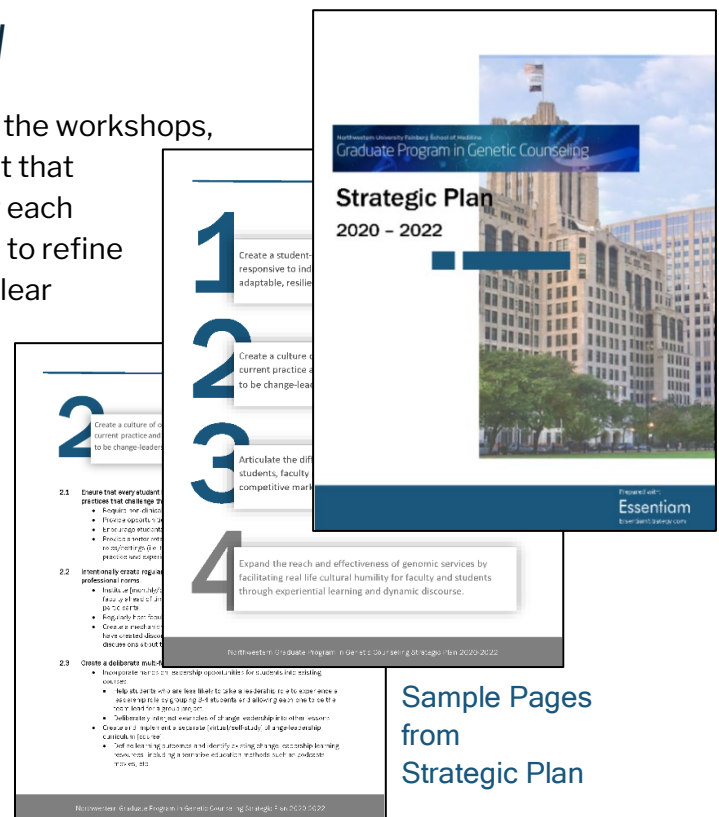
Since our CEO and lead facilitator is just 10 miles from the Palatine Library District office, we are in the unique position of being able to be in-person at the library for the workshop(s), key meetings, and focus groups as needed throughout the process at no additional cost to NPL.

Plan Documentation & Approval

Building from the ideas and language created during the workshops, Essentiam will create a draft strategic plan document that includes 3-5 high level goals as well as objectives for each goal. Working with the NPL team, we will collaborate to refine the language and create a complete draft plan with clear outcomes in the form of goals, objectives, and activities.

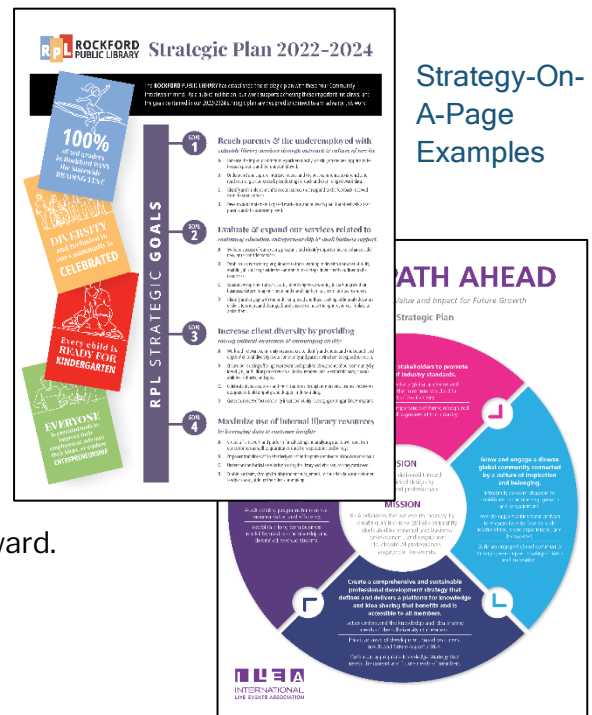
Components of this project phase usually include:

- **Plan Refinement with Staff and Key Leaders:** Working with the staff team and a small group of organizational leaders to finalize goals, objectives, and activities.
- **Development of Final Draft Plan:** Creating a complete draft strategic plan document.
- **Plan Presentation to the Board:** Supporting the presentation of the final plan for Board approval.
- **Plan Review:** Providing up to two rounds of review, input, and changes, if required.
- **Final Plan:** Providing a final strategic plan document in PowerPoint and Excel formats.



Sample Pages from Strategic Plan

- **Strategy-on-a-Page:** Developing a one-page representation of the plan that can be shared on the library’s website, in printed materials, and with volunteers and staff.
- **Implementation Toolkit:** Sharing an Implementation Toolkit that includes a 3-year roadmap, implementation planner, quarterly tracker, and KPI dashboard along with instructions and coaching for the team on how to monitor and update the plan across its lifecycle.
- **Assessment Tool:** Using our experience and network to work with key library staff to identify an appropriate measurement/assessment tool or framework to help guide the library’s work going forward.



The strategic planning process is a combination of both art and science. You understand both and have the experience to find the common ground with clients to help them through the process.

- Jim T, Board President

The planning workshop was terrific, thank you for an exciting and engaging session! Every time we work together, you take time to learn about the nuances and culture of that specific organization. Our group really benefited from the diversity of your experience and breadth of knowledge - that really sets you apart.

- C Pfitzinger, Executive Director

Project Schedule

Following is a general timeline of activities to begin in July 2023. This timeline assumes a strategy workshop in October or November but can be adjusted based on NPL’s preferences. Also included is a typical schedule of post-workshop activities culminating in final plan approval by the board at its February 2024 meeting. All plan documentation would be delivered by the end of February 2024.

Please note that this is a collaborative process with community and team engagement throughout. The final timeline will be dependent on the availability of NPL staff and leaders to meet and work with consultants. We will also work with you to determine the appropriate cadence and facilities for community outreach.

Description	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Community Engagement <ul style="list-style-type: none"> • Situational Review • Interviews • Survey • Focus Groups • Planning Questionnaire • Research Report 								
Planning Workshops <ul style="list-style-type: none"> • In-person/Virtual Workshops 								
Plan Documentation <ul style="list-style-type: none"> • Presentation of Draft Plan • Preliminary Plan Approval • Implementation Planning • Final Plan Approval • Final Documents Delivered 								

Essentiam: Your Partner in Planning

Essentiam is a woman-owned strategy consultancy established to assist growth-minded leaders with creating organizational focus to accomplish more, faster and with less operational resistance. By asking the right questions, bringing together the right people, and gathering the right intelligence, we help clients see beyond their current horizons to create a clear strategy for growth and mission achievement.

Experience

Having worked with more than 50 different mission-driven organizations, Essentiam brings broad experience and specific knowledge to help NPL write the story of its next chapter. We are known for asking targeted, probing questions to understand your constituents' perspectives and bring forward meaningful insights. Our years of experience facilitating strategy sessions, focus groups, and meetings of all sizes helps us to quickly build rapport, gain trust, and encourage engagement with participants in both in-person and virtual settings.

Our experience includes more than:

41 
New/Renewed Strategic
Plans Developed

90 
Full-Day Workshops
Facilitated

100+ 
One-on-One
Interviews Conducted

675 
Trained Organizational
Leaders


1K+ 
Research Questions
Answered

>40 
Visions
Clearly Articulated

100s 
Focus Groups
Facilitated

>150 
Board Members Enabled
with Governance Knowledge

38 
Industries, Professions,
Sectors Served

22 
Regional & National
Conference Presentations
Given

27 
New Products
Launched

80+ 
Global & Regional
Events Managed

Consultants



STEPHANIE KUSIBAB
CEO & Chief Strategist
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312.343.0074

Stephanie Kusibab is a strategy consultant and coach with more than twenty years' experience assisting client organizations in the for profit, nonprofit, and membership organization arenas with a focus on research, marketing, and high-level business vision and strategy. Stephanie is a lateral thinker who can quickly understand and assess a situation and identify growth opportunities across any industry or profession. She believes the most powerful ideas come from bringing people together. Through deliberate, structured interactions digitally and in-person, she helps organizations tackle high-stakes conversations, mine diverse perspectives, generate new ideas, build stronger teams, and understand market opportunities. Her professional experience includes high level roles in consulting and marketing at publicly and privately held organizations.

Prior to starting Essentiam, Stephanie led the consulting team at SmithBucklin, an association management company, working with boards of directors and executive teams across a wide range of industries and professions. At SmithBucklin, Stephanie also served as CMO for a number of full-service clients including the Legal Marketing Association (LMA), the Clinical Laboratory Management Association (CLMA), Palo Alto Networks' User Group (Fuel), and the Battery Council International (BCI).

Previously, Stephanie held a variety of positions at ACCO Brands, a house of brands that markets and manufactures office products through direct and indirect channels. At ACCO, she was responsible for strategic planning for a \$200M division of the company and established the first new product roadmap for the services category. Stephanie has managed global teams and processes both at ACCO and as a contract consultant for ABN AMRO Bank. At ABN AMRO, Stephanie facilitated group planning sessions between account teams and product teams on four continents.

Stephanie holds a Bachelor of Science degree in organizational psychology from Loyola University Chicago and is a graduate of the SmithBucklin Leadership Learning Forum, a yearlong intensive leadership course for top-performing employees.

She is committed to equity, diversity, and inclusion. She co-led implementation of a DEI initiative for the Legal Marketing Association and served on the inaugural executive leadership team of the SmithBucklin InCouncil.

Stephanie serves on the board of directors for the International Association for Strategy Professionals (IASP) and contributed sections on shared visioning, culture, facilitation, and teamwork for its Body of Knowledge 3.0. She is a member of the American Society of Association Executives (ASAE) and has completed the Certificate of Nonprofit Board Consulting from BoardSource. She also regularly provides consulting services and training for the Northern Illinois Center for Nonprofit Excellence (NICNE) and contributes to the Grey Swan Guild, delivering foresight and sensemaking projects through its Cygnus Sprints consulting team.

Previous Workshop Participant Feedback

I really appreciated the overall, "safe" collaboration which was a result of Stephanie's facilitating.

Stephanie knows how to pull out information from those who are not always willing to speak up, in a way that makes them realize that they and their input are valid and important to the group.

Stephanie was a very effective facilitator. She knows when more guidance and when less guidance is necessary.

We covered a lot of ground in a short amount of time.

The session helped me hear the various perspectives and listen to opinions I might not agree with yet found compelling enough to compromise on.



JAMI YAZDANI
Implementation Director
Pronouns: she/hers
jyazdani@EssentiamStrategy.com

Jami Yazdani, MLIS, is a project management and planning consultant with more than 16 years of experience managing a portfolio of diverse projects and planning initiatives. Jami has led planning initiatives in library, nonprofit, and higher education environments. As a certified Project Management Professional (PMP), she brings a project management perspective to strategic planning, focusing on impactful plan implementation and supporting broad accountability for plan success through collaborative planning.

Prior to joining Essentiam, Jami spent 15 years in academic libraries, including more than 10 years in leadership and management roles. She began her library career in circulation before earning a library degree and has been a reference librarian, technology librarian, library manager, and library director. She has more than 4 years of experience as a consultant providing project management, planning, and facilitation support to mission-driven organizations.

Most recently, Jami supported the North Carolina Council on Economic Education (NCCEE) in strategic planning. Jami led NCCEE staff, stakeholders, and partners through a collaborative and efficient planning process to confirm and align their organizational strategic priorities, develop an actionable 1-year implementation plan, and create a staffing plan to support organizational growth and sustainability. Jami's recent work also includes providing training on strategic planning and project management topics for library audiences.

Jami has actively served on the boards of several professional associations and nonprofits, working in leadership (Chair and Vice Chair), marketing, programming, and mentoring roles. She currently serves on the board of the Triangle Organizational Development Network and is a member of ALA and the North Carolina Library Association.

Jami holds a BA in Government and Politics from George Mason University, a Master of Library and Information Science from Louisiana State University, and a Master of Technology Management from the University of Maryland Global Campus. She also holds several active certifications from the Project Management Institute: A Project Management Professional certification, a Disciplined Agile Scrum Master certification, and a Wicked Problem Solving Practitioner certification. Jami is also the founder of the Consultants for Libraries community.

Previous Client Feedback

Jami made the process a breeze for me. Thank you for helping NCCEE create a comprehensive one year plan during a time of transition for our organization!

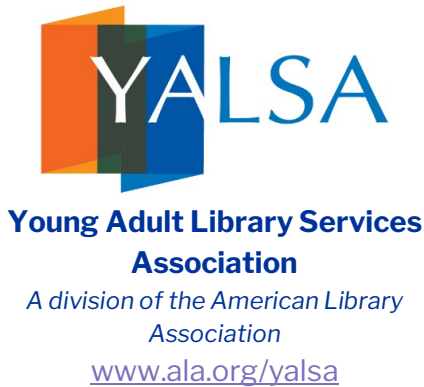
[Jami] kept us on track and on task, using our time together efficiently. We now have a great roadmap for the future.

Terrific adaptation to the team and our workstyle. [Jami] facilitated important and hard discussions.

Jami's expertise and support in project management, people management, and facilitation significantly increased the quality of the deliverables and the enjoyment of the team in doing the work.

[Jami's] collaborative, positive style provided practical resolutions to any implementation challenges that arose.

References



Engagements: Strategic Planning and Implementation with extensive community engagement



Tammy Dillard-Steels, MPH, MBA, CAE
Executive Director

tdillard@ala.org
312-280-4391

Pronouns: she/hers



Engagements: Strategic Planning and Implementation



Anne O'Keefe
Assistant Director for Community
Engagement

aokeefe@rockfordpubliclibrary.org
815-987-6611

Pronouns: she/hers



Engagements: Strategic Planning, Implementation Planning & Facilitation through an equity lens



Danielle (Dannie) Shaw
Managing Director

ds@providecare.org
773-517-9118

Pronouns: she/hers



<https://www.niu.edu/nicne/index.shtml>

Engagements: Collective Impact Facilitation, Futures Thinking Workshops, Client Strategic Planning engagements



Pam Clark Reidenbach
Executive Director

pclark1@niu.edu
815-753-8733

Pronouns: she/hers

Outcomes

Through our work together, NPL will adopt a new 3-5-year strategic plan to guide activities for future success. NPL will define its current and future opportunities, articulate its desired outcomes, and put in place a plan for achieving them. Your vision statement will be aspirational and memorable, making it a powerful way to inspire all stakeholders by describing the important impact their organization makes to create a better world. Your mission statement will define the framework of what you do, for whom and how, providing clear guidance for day-to-day operations. Your core values will be affirmed as a strong statement of the way you work together and serve the community. Your plan will guide strategic growth and provide clear priorities to focus organizational activities and drive success.

Your new plan will be documented in PowerPoint and Excel formats. Essentiam will also provide the plan in a convenient, graphical Strategy-On-A-Page format, an Implementation Planning Toolkit in Excel, and a recommendation for a measurement/assessment tool.

The planning process is also designed to strengthen relationships and provide a broad view of strengths and opportunities by soliciting input from a cross-section of organizational stakeholders and encouraging rich dialogue amongst the board of trustees and key staff. Our clients find that this collaborative process builds a sense of community and teamwork and provides a vocabulary and framework that welcomes open and productive conversations going forward.

We tackled a massive strategic discussion, accomplished our goal of creating a more focused, relevant, and sustainable vision and mission for our association, and we had a little bit of fun in the process. We laid a great foundation for our future.

- Sara G, Board President

Thanks for all your help with [our association]. They are on a good path because of the work you did.

- Susan L, Executive Director

Budget

The professional project fees presented below are a flat, not-to-exceed fee based on our understanding of the service level required to perform the services as outlined in this document. We do not bill hourly. In this way we focus on creating high quality outcomes and experiences based on our expertise rather than tracking time.

<i>Strategic Planning Workshops and Plan Documentation:</i> Includes Participant Questionnaire, Planning and Facilitation of up to 10 hours of Strategic Planning Workshops; Refinement of your Vision, Mission, and Values Statements; Creation of Strategic Plan Documents in PowerPoint and Excel formats; Approval Support; Activities/Tactics; Creation of Strategy-on-a-Page; and Provision of Implementation Toolkit		15,750
<i>Situational Review and Community Engagement:</i> Includes all elements as outlined below		13,250
Situational Assessment & Community Profile	1,500	
Telephone Interviews (10)	2,250	
Online Survey Development and Reporting	5,000	
Focus Groups/Listening Sessions (5)	2,500	
Consolidated Research Report	2,000	
Total Professional Project Fees		\$29,000
Bundled Services Discount		-2,900
Discounted Professional Project Fees		\$26,100

Changes in scope prior to contracting may impact fees. Post-contract, any change requests that impact scope will be discussed and approved with the client in advance of implementation.

Estimated Out of Pocket Expenses

Out-of-pocket expenses, including travel-related expenses, parking, postage, and extensive printing are not included and may be invoiced for reimbursement at cost as they occur. Our lead facilitator is local, which allows us to meet with NPL in-person as required throughout the engagement and to conduct the strategy workshop and focus groups in-person, if desired. **Assuming all meetings and facilitated events are held at or around NPL or virtually, our estimate of project travel expenses from Essentiam are less than \$100.**

Optional out-of-pocket expenses may include the following if requested/required by client: printing of pre-reading packets for workshop participants and incentives for interview or focus group participants. We find that most mission-based organizations are able to complete this work without incurring these expenses.

Standard workshop materials of easel pads and markers as well as in-person meeting facilities and related expenses will be supplied by client.

Conclusion

Thank you for the opportunity to present this proposal for strategic planning. With Essentiam, you work directly with our primary consultants, who are located in Chicago and have ties to your community. We have many years of strategic planning, research, and library experience as both practitioners and consultants to mission-based organizations.

We strive to be true partners in your success, spending the time needed to build relationships and learn about your people, challenges, and opportunities while creating a unique plan for continued success.

We look forward to the opportunity to work with you, your team, and your board to implement a strategic planning process that delivers a compelling mission, vision, strategy, and set of core values and culture statement. We are committed to ensuring a positive experience for all stakeholders aligned with your needs and culture. Together, we will clarify your direction and articulate your passion, helping you inspire your staff team, volunteers, community members, and other stakeholders. We are confident that, working collaboratively, we can identify the opportunities ahead, and put a plan in place to ensure the award-winning legacy of the Northbrook Public Library.

If you have any questions about this proposal, our qualifications, or process components please reach out. We are happy to work with you to ensure a process that meets your needs and exceeds your expectations.

We look forward to hearing from you soon!

Best regards,



Stephanie Kusibab

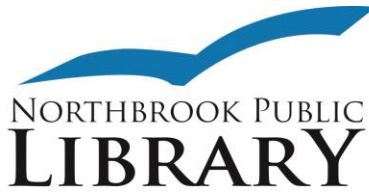
312.343.0074

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Essentiam

Strategy | Planning | Leadership | Growth

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STRATEGIC PLANNING SERVICES RFP COVER SHEET

Name: Amanda E. Standerfer

Organization: Fast Forward Libraries LLC

Email: amanda@standerferconsulting.com Phone: 217-821-2880

Address: 712 Arlington Ct.

City/State/Zip code: Champaign, IIL 61820

Checklist:

- A list of key personnel
- A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in strategic planning.
- A work plan that includes
 - a description of the methodology,
 - list of tasks,
 - project timeline, and
 - estimated total amount of time that would be spent on the project.
- Exclusions or exceptions.
- A schedule of costs that includes
 - consulting,
 - supplies,
 - number of onsite and virtual visits and cost per trip, and
 - other costs associated with the planning process.
 - data gathering and analysis (community research component) must be listed separately.
- List of 2-3 references of libraries or nonprofits who have been your clients within the last three years, including names, contact information

Strategic Planning Proposal for the Northbrook Public Library

April 5, 2023



Proposal submitted by:



Amanda E. Standerfer, Founder and Lead Consultant
Fast Forward Libraries LLC
712 Arlington Ct.
Champaign, IL 61820
217-821-2880
amanda@standerferconsulting.com
fastforwardlibraries.com

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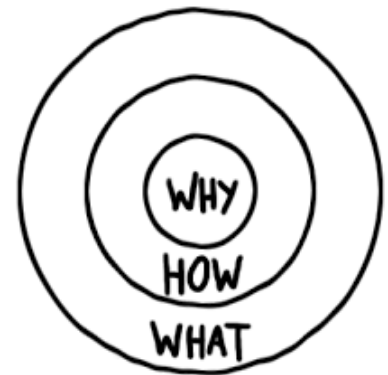
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Cover Letter

I am pleased to submit this proposal to Northbrook Public Library (NPL) for strategic planning process facilitation and consulting. I am the founder and lead consultant for [Fast Forward Libraries LLC](#), a small consulting group specializing in assisting libraries and nonprofits over the past 20 years with focused, flexible planning processes to increase their performance and impact. Besides strategic planning, we assist organizations with fundraising and development planning, capacity building/organizational development, staff training and team building, data collection and analysis, and grant writing.

This proposal details a grounded research planning process that will result in a focused, actionable 3–5-year strategic plan for NPL. The Fast Forward Libraries team has extensive experience working with public libraries and strives to be a neutral process facilitator and partner to maximize community and stakeholder input, reflection, learning, and plan operationalization so the resulting strategic plan is compelling, responsive, and focused. We are steeped in organizational development methods and group dynamics, both essential elements of the strategic planning process. We specialize in processes leading to a graphical one-page strategic plan (see examples provided), which is vital for community and stakeholder communication and a visual reminder of the strategic direction during the life of the plan.

The graphical one-page plan is supported by an annual activity plan to guide the day-to-day management of the plan that roll up to the established strategic directions, mission, and vision. Using [Simon Sinek’s “Golden Circle”](#) (*Why? How? What?*) model and PLA’s new [“Strategic Planning for Public Libraries”](#) by Joy L. Fuller¹ as a framework for the process, stakeholders at all levels find connection and purpose in the plan which makes success achievable.



Each process we facilitate is customized to achieve shared goals. Helping libraries develop their strengths and become learning organizations is our passion because libraries are the anchor of democracy in our society, and we need to evolve to respond to community needs in holistic ways that honor the complexities of our society. Adopting the practices of a learning organization during the planning process will equip NPL to be a flexible, nimble, and vital institution for decades to come.

It’s exciting that NPL is engaging in strategic planning and considering library impact in the community. Strategic planning is a crucial development activity and will positively impact NPL for years to come. I think you will find that our proposal closely aligns with your needs. Please do not hesitate to email or call with any questions. I look forward to hearing from you!

Amanda E. Standerfer

Founder & Co-Lead Consultant

April 4, 2023

¹ Our client [Indian Trails Public Library District](#) in Wheeling, Illinois is heavily featured in this new publication.

Executive Summary

The Northbrook Public Library (NPL) seeks to engage in a collaborative, participatory planning process that will result in a comprehensive 3–5-year strategic plan for the library. After the uncertainty of the last several years, it's a good time to celebrate success, assess what's working, deepen community connections, and set a course for the next three plus years. Using a fresh, streamlined strategic planning process, NPL can consider what opportunities exist and how to evolve to increase impact in the community and broaden partnerships, especially focusing on reaching underserved populations through an appreciative inquiry and grounded research approach. To that end, this proposed learning-focused strategic planning process will result in a clear, adaptive plan that is grounded in the library's strengths to streamline decision-making and focus on impact.

In our approach, we use:

- [Systems thinking](#) - considering individual aspects of the library, how they interrelate, and what this means for overall dynamics and potential levers for change.
- [Design thinking](#) - putting humans as the core of the library's work.
- [Adaptive action](#) - the simple framework of *what? so what? now what?* grounds us in inquiry throughout the process. By coming back to this framework throughout the process, we can be iterative in our learning that will inform final plan documents.
- [Diversity, equity, and inclusion](#) - DEI is a critical foundational lens that is applied throughout the process.

The planning process is organized into three phases:

LEARN: Core to the planning process is learning. Learning requires research, information gathering, dialogue, and analysis. A considerable amount of time is devoted to learning during this process—both internally within the library, and externally out in the community—to help participants deeply connect with all things NPL. Our role as process facilitators is to direct learning activities and to serve as a neutral guide during the process.

Internal learning: Board and Staff members will complete a **Library Strategic Capacity Assessment** to: 1) Determine environmental factors outside the library that need to be considered while engaging in the strategic planning process, 2) identify core operational priorities and gaps, 3) surface strategic opportunities to consider, and 4) provide feedback about workplace culture. Feedback from this online tool helps determine topics for further consideration later in the planning process, and the resulting report informs a Leadership Team Retreat to begin to consider strategic plan implementation as a critical element of the planning process and not a separate process that only starts once the plan is developed.

External learning: Community input (qualitative and quantitative) will be gathered in multiple ways with exact methodology to be determined with NPL's specific needs. We will concurrently engage in a community needs assessment process using focus groups and interviews to gain a broad view of what's on the minds of community members representing various stakeholders and groups, especially focusing on non-users. Focus groups will be offered both virtually and in-person, in Spanish and English. At the same time, we will conduct a community survey to get broad community input about library strengths and impact. In addition, we will compile data on community demographics and community organization strategies to give additional context to the process. We will look for strengths and connections to help Trustees and Staff consider NPL's role in new ways.

We'll summarize external learning data with findings in an extensive Learning Report. The Learning Report is key to informing the agenda for the DREAM phase of the process.

DREAM: During this phase, Trustees and Staff members will synthesize the learning and dream about the future during retreat sessions. The retreat sessions allow for dedicated time and space to step back and think

strategically, working through ideas together to build strategic plan elements. In addition, we'll review (and update if needed) the current vision and mission statements to reflect the unique aspirations the library has for the community and how the library will work to achieve those aspirations.

DO: Finally, the plan will start to take shape, and we'll spend time during this phase developing and revising documents and graphics that make the plan come to life. We'll work with the Leadership Team to develop an Implementation Guide to inform an activity plan, evaluation framework, and reporting timeline that will guide operationalizing of the plan and help NPL think about the plan's narrative and milestones.

The final product will be a comprehensive, data-driven, outcome-focused strategic plan with an accompanying one-page graphical version. The plan will be realistic in scope and include a recommended activity plan draft with an evaluation framework. Committing to this process and way of operating will require clear communication and buy-in from Staff and the Board. The results will unify and energize all involved!

A Note on COVID-19

Planning always comes with unique challenges and opportunities for the organizations involved. Current events dictate further complications with renewed efforts to fight COVID-19 and its variants. As such, this plan relies on gathering community, staff, and stakeholder aspirations, wants, and needs using a hybrid of virtual engagement tools and, should conditions allow, in-person methods.

With extensive experience in virtual community engagement and collection of qualitative data, the consultants of Fast Forward Libraries can confidently deliver virtual engagement and planning activities when necessary. In our experience, there is no substitute for in-person conversations and engagement. However, virtual options remove some barriers and allow for collection of ideas and opinions from a more diverse pool of community members and stakeholders. When it is safe for communities and stakeholders to gather in person, our consultants will be there to lead activities. Ideally, a hybrid virtual/in-person approach will be adopted regardless of the effects of COVID-19.

Your Strategic Plan Overview / Summary of Deliverables

Deliverable	Purpose
<p>Learning Report</p> <ul style="list-style-type: none"> Comprehensive report of all external qualitative and quantitative data gathered during the initial phase of the planning process, including a community demographic profile with 2010 to 2020 comparisons (as available). Provides analysis and findings that help the staff and Board build strategic plan elements. 	<ul style="list-style-type: none"> Key tool for informing strategic planning process. Summary to provide community members and stakeholders as support for strategic plan elements.
<p>Library Strategic Capacity Report</p> <ul style="list-style-type: none"> Summarizes findings (strengths, gaps, and opportunities) from the Library Strategic Capacity Assessment. Provides analysis and findings that help the Leadership Team prepare for strategic plan operationalization. 	<ul style="list-style-type: none"> Used during Leadership Team retreat to weave in operationalizing the strategic plan early in the process (vs a separate process after the plan is finalized). Informs possible agenda topics for Board and Staff Retreat sessions.
<p>One-page Graphical Plan</p> <ul style="list-style-type: none"> High-level graphical version of the strategic plan. Quick reference for: <ul style="list-style-type: none"> Vision Mission Strategic Directions Goals 	<ul style="list-style-type: none"> For communication about strategic direction. Use in library (as a flyer and poster), on website, and in publications. Use in Board reports as reminder of high-level strategy. Use in staff areas as reminder of high-level strategy. Use with library users/the community in publications and at meetings as a reminder of high-level strategy.
<p>Strategic Plan Document</p> <ul style="list-style-type: none"> This is the expanded, more traditional text-heavy strategic planning document for Board approval. It provides additional context and detail about the planning process and other plan components. 	<ul style="list-style-type: none"> Use on your website as the “full plan” for community/stakeholders to review. Staff should have access to this document so they can understand their role in implementation.
<p>Implementation Guide: Activity Plan, Evaluation Framework, and Reporting Timeline</p> <ul style="list-style-type: none"> The activity plan is an internal document for staff/Board to use when planning annual activities that will help meet the plan goals, timeline, and staff responsibilities for the activity. The activity plan can also be used for internal updates/reports to streamline strategic plan management. The activity plan changes and is updated annually by staff. 	<ul style="list-style-type: none"> Staff use the activity plan to detail annual activities and accomplishments. The activity plan can also be used to set individual performance goals. The activity plan can be used to develop progress reporting using template. Evaluation framework, aligned with goals, helps stakeholders understand

<ul style="list-style-type: none"> • The evaluation framework breaks down which metrics will show progress for each goal. • The reporting timeline details how, when, and what will be reported to various stakeholder audiences as well as how data will be used for continuous improvement over the life of the plan. 	<p>metrics that show strategic plan success.</p> <ul style="list-style-type: none"> • Reporting timeline guides development of communication to stakeholders related to the plan.
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Key Personnel and Qualifications/Experience

Amanda E. Standerfer, MA, MLIS



Amanda’s passion is helping libraries and nonprofit organizations advance so they can create meaningful impact in their communities. Since 2002, Amanda has served as a consultant and facilitator, working with libraries, nonprofits, and small businesses on strategic planning, fundraising, organizational development, and capacity building (operating as a sole proprietor until formalizing as Fast Forward Libraries LLC in early 2022).

Amanda was most recently the Director of Community Engagement for [The Urbana \(IL\) Free Library](#). She’s spent about half of her career working in philanthropy (as Program Officer for [The Lumpkin Family Foundation](#) based in Mattoon, IL and as Program Director with the [Southeastern Illinois Community Foundation](#), serving Effingham and Mattoon, IL) and the other half in libraries (as Head of the Adult Division at the [Decatur \(IL\) Public Library](#) and as Director of the [Helen Matthes Library](#) in Effingham, IL). She loves melding her library and philanthropy knowledge – a self-proclaimed “philanthro-brarian.”

Amanda has twice been elected to the Board of the [Illinois Library Association](#) (ILA), most recently completing a three-year term in 2016. Amanda was also selected as a member of the first class of *Synergy: The Illinois Library Leadership Initiative* and one of only two librarians ever selected for participation in *Leadership Illinois*.

Amanda holds a B.A. and an M.A. in history from [Eastern Illinois University](#) and an M.S. in library and information science from the [University of Illinois at Urbana-Champaign](#). You can find out more about Amanda on [LinkedIn](#).

Amanda is the lead consultant for this project and will manage all aspects of the process except for the community needs assessment focus groups and interviews.

Cindy Fesemyer, MA, MLIS



Helping information organizations see the big picture as they strive to help their community reach its aspirations is Cindy Fesemyer's passion as the Principal of Fesemyer Consulting, LLC.

Community engagement, qualitative assessment, strategic planning, engaged leadership, staff training, and keynoting are her areas of expertise.

Previously she was employed at the Wisconsin State Library as their first Adult and Community Services Consultant and served seven years as Director of the Columbus Public Library (WI), named a finalist for Library Journal's 2017 Best Small Library in America. She teaches academic and continuing education courses for the UW-Madison iSchool, sits on various committees of the Public Library Association, and is a Trustee for the Madison Public Library.

Librarianship is Cindy's second career. After 14 years managing non-profits, she earned her MLIS from UW-Madison in 2012 and dual Masters in English Literature and Teaching Writing from Humboldt State University.

Cindy is the lead consultant for the community needs assessment aspect of the process.

Martin Alvarado, MLIS



Martin Alvarado has worked in public libraries for over two decades and is currently the Community Engagement Librarian for Business and Technology at Madison Public Library, Wisconsin, focusing on equitable support for diverse entrepreneurs and digital inclusion. Martin has an MS in Library and Information Sciences (IT Concentration) from UW-Milwaukee. A native of Mexico City, Mexico, Martin is bilingual and serves as a Spanish-language subject matter expert on the City of Madison's Language Access Steering Committee. He is also an active participant in the City's Racial Equity & Social Justice Initiative (RESJI). Martin has experience in human-centered design and a certificate from the Bloomberg-Harvard City Leadership Initiative: Innovation Track.

Martin will provide a review of all plan deliverables through a diversity, equity and inclusion (DEI) lens.

Laura Huddleston, MLIS



Laura Huddleston is an associate consultant with Fast Forward Libraries. She has a special interest in the “how” of public libraries and loves to learn about ways they can thrive to benefit patrons and communities.

For ten years, Laura led the children’s department at the Mattoon Public Library perfecting a few story time voices and the ability to find a title based on a two-word description. During her tenure, Laura managed collection development, various school/public collaborations, and all children's programming. She helped design and launch the MPL’s inaugural Book Buggy mobile library to reach underserved youth and piloted the First Grade, First Card program to bring library cards to local first-graders. Laura served on the ISLMA Monarch Award Committee and received a 20 Under 40 Award from the Mattoon Journal Gazette for contributions to her community.

Laura recently served as Program Officer for Community Outreach and Organizational Learning at the Lumpkin Family Foundation where she led new efforts in trust-based philanthropy, impact evaluation, and organizational learning including a facilitated EDI process for board and staff.

Laura currently serves as a trustee of the Mattoon Public Library and as a community advisor for the Coles County Peace and Justice Fund. She holds a BA in Spanish and secondary education from Eastern Illinois University and an MLIS from Indiana University.

Laura is the project manager, providing research and logistical support, supports community input elements, and manages the development of the Learning Report.

Sarah Forbes, PhD.



Dr. Sarah Forbes is the founding Director of Student Academic Success at [Rose-Hulman Institute of Technology](#), helping students to discover new strategies to achieve their academic goals. Prior to this, Sarah spent 10 years as the Director of Data Management and Reporting. Her role in the Office of Institutional Research, Planning and Assessment was to manage data collection and reporting to all functional units on campus as well as to external constituents. She also served as a liaison between Academic Affairs and Enterprise Information Technology, helping each group to identify their needs and streamline both data entry and reporting processes.

Prior to working at Rose-Hulman, Sarah worked at the [Helen Matthes Library](#) in Effingham, Illinois. There she focused on marketing, outreach, and adult education.

In her spare time, Sarah serves as a research consultant to non-profit organizations. Sarah earned a B.A. in Psychology from [McKendree University](#), an M.A. in Experimental Psychology from [Indiana State University](#), and a Ph.D. in Curriculum and Instruction from [Indiana State University](#).

Sarah assists with community survey development and compiles data for the Learning Report.

Jennie Grace, BFA



Jennie Grace is the Graphic & Web Designer for [The Urbana \(IL\) Free Library](#), a position she's held since 2007. Jennie holds a BFA in graphic design from [Eastern Illinois University](#).

Jennie creates the one-page plan document.

Work Plan

Phase I: LEARN

The first phase of the strategic planning process is the longest and the most important! During this phase, we'll spend time gathering data internally and externally to inform the strategic planning process. Amanda and Cindy co-lead this phase.

Form the Planning Team: First, we will establish the Planning Team (5-7 staff members and Trustees) to work with Amanda to guide and manage the planning process. The Team meets regularly throughout the process (as a group and via email) to give input about various aspects of the process and to edit/refine process/plan documents. To get started, we'll hold a kick-off meeting to finalize the timeline, get some initial input, and start planning the community survey and focus groups/interviews. The Planning Team will gather internal and external documents to inform the process, like library data, evaluation reports, previous strategic plan reports, community demographic data, and strategic plans for other community organizations. As part of our data review, we will also review the Village of Northbrook's Climate Action Plan, the EDI After Action Report from The Blackberry Collection, and Lily Zheng's potential quantitative assessment work.



Library Strategic Capacity Assessment and Leadership Team Retreat: Amanda will lead this portion of the process. It is vital to start thinking about how to operationalize the strategic plan early in the strategic planning process vs waiting until the plan is finalized to transition to implementation (a critical transition where many libraries get stuck). We weave dialogue about operationalizing the plan into the entire planning process. To do this, we need input from Trustees and Staff members related to the library's capacity for strategic impact as related to four key areas: 1) The environment in which the library operates, 2) the core operations of the library, 3) strengths and opportunities for strategic impact, and 4) organizational culture. This unique online Assessment (designed by Fast Forward Libraries) provides an overview of library strategic readiness, concerns, gaps, and opportunities to inform future conversations during the strategic planning process. To prepare Trustees and Staff members to complete the assessment, we will provide a brief strategic planning process orientation video that provides an overview of process elements, their roles during the process, and guidelines for how to complete the Assessment.

The analysis and findings from the Assessment are reviewed at a Leadership Team Retreat where we 1) start to identify potential strategic directions for further discussion in the DREAM phase, and 2) identify strengths, gaps, and opportunities for strategic plan implementation in the areas of "core, strategy, and culture" that we will revisit during the DO phase.

Community Needs Assessment Focus Groups & Interviews: Cindy will lead the Community Needs Assessment portion of the process. To gather input from diverse voices and non-users, we will use a needs assessment approach. NPL will have the opportunity to strengthen its community partnerships when library staff reach out to community stakeholders and groups working with underserved populations to ask for their assistance in organizing specific focus groups and encouraging participation in the process. Interviewees will share information about themselves, their community, and the library. Focus group attendees will share their aspirations for the community in which they work, live, and play. Focus groups delve into *community* aspirations, not *library* aspirations, resulting in great ideas for out-of-the-box library programming and partnerships that truly serve diverse communities. Overall, focus groups and interviews provide vital input into the library's ability to address overarching community wants, needs, and concerns.

Gather Community Feedback & Conduct Research: At the same time as the community needs assessment process, we'll gather community and stakeholder feedback via a survey. The community survey is key to gaining

a broad understanding NPL’s current state, strengths, and potential future direction from community members that care about the future of the library. Amanda, Laura, and Sarah will develop the community survey (edited and approved by the Planning Team) to get qualitative and quantitative input on:

1. **Awareness of Library Services** – How aware are respondents of the various library services? Where do they learn about what’s going on at the library? (This data can be benchmarked for future evaluations.)
2. **Value and Satisfaction** – What aspects of NPL’s work do respondents value the most? Are they satisfied with NPL’s work? (This data can be benchmarked for future evaluations.)
3. **Community Needs** – What are top community needs? How might the library address these needs?
4. **Future Focus** – What’s important going forward? What are NPL’s strengths? How should NPL measure success?
5. **Other relevant questions** – Operating hours? Facilities? Accessibility? Support of a future referendum? TBD by the Planning Team

In addition, we’ll compile community demographic data and complete a scan of community organization strategic plans to identify needs, opportunities, and gaps.

At the end of this phase, Amanda, Laura, Cindy, and Martin (with assistance from library staff) will gather all external learning information into a Learning Report. The Learning Report will identify library strengths and provide findings that will ground the Board and staff retreats in the next phase.

Deliverables:	Finalized planning process timeline with meeting dates. Learning Report that includes analysis and findings from information gathered/reviewed, survey, focus groups, and interviews, with an eye to a diversity, equity, and inclusion (DEI). Regular check-ins with Library Director.
Timeframe:	July – October 2023

Phase II: DREAM

This phase starts with a Planning Team meeting to review the Learning Report and plan for the Board and staff retreats. Amanda is the lead consultant in Phase II.

Board Retreat Session: The 3-4-hour Board retreat will focus on reviewing learning and dreaming about the future. During the retreat, we’ll get the Board up to speed on the planning process, review and discuss the Learning Report, review and update the vision, mission, affirm strategic directions, and set plan goals. During the session, the Board will also talk about possible activities that will help achieve plan goals. We’ll use our time to critically think about what’s most important for NPL, including new services that will address priorities, services to discontinue, capacity building strategies, methods of outreach that might attract underserved populations, and funding implications.

Staff Retreat Session(s): During this phase, we’ll also hold a 3-4-hour staff retreat (or multiple, shorter retreats to maximize staff participation) to also share the Learning Report and dream about the next 3 years. Staff will spend time brainstorming activities that will help achieve plan goals. This input is valuable to the activity plan that will guide implementation.

Leadership Team Retreat Session: Once the plan elements start to come together, the Leadership Team will meet to review and refine the plan outline during a 2-hour retreat session. During this meeting, we will engage in an exercise to review and refine the vision, mission, and values statements. We will also use a sustainability and EDI lens for the retreat dialogue to ensure we are incorporating these elements into the strategic plan. At

the end of the meeting, we will have the draft language to develop plan documents in the DO phase and to recommend to the Board.

It's important that everyone feel engaged at the retreats and that their perspectives are expressed and respected, so the facilitation will be flexible to accommodate for multiple input methods. At the end of the sessions, participants will feel confident that NPL is on the right track for transformative change, rooted in strategies for equity, innovation, and flexibility in the delivery of library services.

Deliverables:	Retreat sessions. Strategic plan outline. Regular check-ins with Library Director.
Timeframe:	November – December 2023

Phase III: DO

In this phase, we'll draft and revise the various plan documents. Amanda, Laura, Martin, and Jennie will prepare drafts of the graphical and written versions of the plan and the activity plan. The Planning Team will review and edit the drafts. In addition, we will share the drafts with key staff and stakeholders for feedback.

After Planning Team review, we'll present the draft plan documents to the Board for final comment/revisions. Amanda will make revisions and present final plan documents for approval.

Next, we will collaboratively develop an Implementation Guide that informs three key elements of operationalizing the strategic plan: The activity plan, evaluation framework, and reporting timeline. We will hold a Leadership Team retreat to review and refine draft documents that the library will use during the life of the plan. The Retreat session will revisit the **Library Strategic Capacity Report** provided during the DREAM phase to ensure critical environmental factors, core operations, and culture are holistically considered as the library transitions from planning to implementation. The Retreat discussion will also help the Leadership Team identify priorities by creating a decision-making matrix for ongoing or new initiatives related to the strategic plan, and sort possible activities into "core, strategic, or culture" areas that are all vital for overall strategic plan success.

Deliverables:	All draft plan documents approximately one month after the retreat sessions with final documents presented a month after presentation of the drafts. A documents reviewed through a diversity, equity, and inclusion (DEI) lens. Regular check-ins with Library Director.
Timeframe:	January – February 2024

Exclusions or Exceptions

Fast Forward Libraries is pleased to offer Spanish translation of the community survey (see the Work Plan). Spanish interpretation of focus groups and interviews is also included. Unfortunately, at this time, no other languages are available, but we are happy to work with your staff on any other language needs to ensure community engagement in the process.

Fast Forward Libraries excludes any cost related to the printing and/or mailing of the community survey. A print-ready version of the survey will be provided upon survey launch and the library can print and distribute this version at the library and throughout the community. While a mailed survey is not recommended, the library may choose to print and mail the survey at their own expense. The library might want to consider a postcard mailing to the community to inform them about the online survey (this type of mailing is less costly and has been effective in other communities). Fast Forward Libraries would advise the library during this process, but not be responsible for any cost associated with the final product. In addition, the library is responsible for entering all printed surveys into Survey Monkey.

Schedule of Costs and Timeline

Phase I: LEARN			
Goal: To finalize the planning process and receive community/stakeholder feedback that will inform the strategic planning process.			
<u>What</u>	<u>Who</u>	<u>When/Duration</u>	<u>Cost</u>
<p>Planning Team Kick-Off Meeting: Review process and timeline, discuss information gathering needs, and initial information gathering.</p>	Amanda, Cindy, and Laura with Planning Team	July 2023 <i>2 hours preparation</i> <i>1.5-hour meeting (via Zoom videoconference)</i> <i>1 hour follow-up</i>	\$600
<p>Community Survey Development and Administration: Develop survey instrument and refine with Planning Team. Administer and monitor survey with Planning Team assistance with link distribution.</p> <p><i>*Print survey available for distribution. Library staff enter responses.</i> <i>**Mailed survey not recommended. Mailing cost not included.</i> <i>***Spanish translation of SurveyMonkey version of the community survey is available for \$2,000. This includes a paper version of the survey for the library to print on-demand.</i></p>	Amanda, Laura, and Sarah with assistance from Planning Team	July – August 2023 <i>30 hours survey development/translation</i> <i>10 hours survey administration/monitoring</i> <i>Email/phone meeting(s) as needed</i>	\$4,000
<p>Community Focus Groups and Interviews: Up to 6 focus group sessions (in-person and virtual) and 10 interviews to learn more about community concerns from stakeholders (like government and school leaders) and groups not already connected with the library. Library Leadership members will invite focus group/interview participants.</p>	Cindy with assistance from Library Leadership	August - September 2023 <i>2 hours planning meeting with Planning Team (via Zoom)</i> <i>4 hours focus group registration and preparation</i> <i>Up to 8 focus groups, one-hour each (in-person and via Zoom)</i> <i>Up to 12 interviews, up to 30 minutes each (via Zoom or phone)</i> <i>8 hours notes and reporting</i> <i>2 days on-site</i>	\$4,500

Learning Report: Develop report that analyzes and synthesizes all external information gathered (including library and community data supplied by library staff).	Amanda, Laura, Cindy, and Martin with editing assistance from Planning Team	October 2023 <i>40 hours learning report</i>	\$4,000
Library Strategic Capacity Assessment: Refine survey instrument with Planning Team for Trustees and Staff to complete. Create report to identify strengths, gaps, and opportunities.	Amanda with assistance from Planning Team	August - September 2023 <i>10 hours preparation (assessment and orientation video)</i> <i>2 hours survey administration/monitoring</i> <i>8 hours report preparation</i>	\$2,000
Leadership Team Retreat: Review Library Strategic Capacity Report. Identify possible strategic directions for further discussion. Begin initial strategic plan operationalization discussion.	Amanda with Leadership Team	October 2023 <i>2 hours preparation</i> <i>2-hour meeting with Leadership Team (via Zoom)</i> <i>2 hours follow-up</i>	\$600
Phase I total (inclusive of supplies and travel):			\$15,700

Phase II: DREAM			
Goal: To report learning to the Board and staff and build plan elements at retreat sessions.			
<u>What</u>	<u>Who</u>	<u>When/Duration</u>	<u>Cost</u>
Planning Meeting: Review Learning Report and prepare for Board and staff retreats.	Amanda and Planning Team	October 2023 <i>1 hour preparation</i> <i>1-hour meeting (via Zoom videoconference)</i> <i>1 hour follow-up</i>	\$300

Board Retreat Session: 3-4-hour, in-person session with Board to review learning and develop strategic plan elements.	Amanda	November 2023 <i>4 hours preparation 4-hour meeting with Board 2 hours follow-up 1 day on-site</i>	\$3,000
Staff Retreat Session: 3-4-hour, in-person session (if gathering all staff in one meeting is not possible, we can hold multiple, shorter sessions to maximize participation) with staff to review learning and brainstorm activities to achieve plan goals. <i>*To keep travel costs low, the Board and staff retreat sessions will be held on consecutive days.</i>	Amanda	November 2023 <i>4 hours preparation 4-hour meeting with staff 2 hours follow-up 1 day on-site</i>	\$3,000
Leadership Team Retreat Session: 2-hour virtual session to review and refine the draft strategic plan outline. Review/refine vision, mission, and values statements. Ensure sustainability and DEI elements are incorporated.	Cindy	December 2023 <i>2 hours preparation 2-hour meeting with Leadership Team via Zoom 2 hours follow-up</i>	\$600
Phase II total (inclusive of supplies and travel):			\$6,900

Phase III: DO			
Goal: To develop and refine all plan documents, develop activity plan aligned with evaluation framework, and prepare for plan approval.			
<u>What</u>	<u>Who</u>	<u>When/Duration</u>	<u>Cost</u>
Document Development: Develop graphical and written plan for review by Board. Deliverable: Draft plan documents for Planning Team review.	Amanda, Laura, Martin and Jennie	December 2023 – January 2024 <i>40 hours</i>	\$4,000
Planning Team Meeting: Check-in with Planning Team to review strategic plan outline document. Plan for Board presentation.	Amanda and Planning Team	December 2023 <i>4 hours preparation</i>	\$700

Deliverable: Strategic plan documents for Board review.		90-minute meeting (via Zoom videoconference) 1 hour follow-up	
Board Meeting: Meeting with Board to review all plan documents and make final revisions. Deliverable: Final plan documents for approval at February 2024 meeting.	Amanda with Board	January 2024 2 hours preparation 1-hour meeting with Board (via Zoom) 2 hours follow-up	\$500
Implementation Guide: Develop draft documents for review by Leadership Team to launch plan implementation. Deliverable: Draft Implementation Guide with draft activity plan, evaluation framework, and reporting timeline.	Amanda and Laura	February 2024 10 hours document development	\$1,000
Leadership Team Retreat: Review and refine Implementation Guide to assist in operationalizing plan.	Amanda with Leadership Team	February 2024 2 hours preparation 2-hour meeting with Leadership Team (via Zoom) 2 hours follow-up	\$600
Phase III total (inclusive of supplies):			\$6,800
Grand total (not to exceed): (inclusive of supplies and travel):			\$29,400

References

Mr. Brian Shepard

Executive Director
Indian Trails Public Library District (IL)
847-279-2202
bshepard@indiantrailslibrary.org

Facilitated comprehensive strategic planning process for public library serving 67,000 residents.

Ms. Donna Richards

Board President
Pollard Memorial Library
Lowell, MA
978-502-7373
Donna.S.Richards@gmail.com

Provided facilitation for strategic planning process for public library serving 111,306 residents.

Ms. Carolyn Coulter

LLSAP Services Manager / Director
PrairieCat (IL)
309-623-4176
carolyn.coulter@railslibraries.info

Provided strategic planning facilitation for multi-type library automation consortium.

Ms. Ann Hokanson

Executive Director
Traverse des Sioux Library System
Minnesota Multicounty Multitype Library Systems
Coordinating Council
833-837-5422 x. 700
ahokanson@tds.lib.mn.us

Provided facilitation for seven multicounty multitype library systems across Minnesota to create the group's first member-informed, joint strategic plan.

I am happy to provide contact information for any client listed on the following page – just ask!

Library Strategic Planning:

- Allegan District Library (MI)
- Athens Regional Library System (GA)
- Bellwood Public Library (IL)
- Bensenville Community Public Library (IL)
- Black River Falls Public Library (WI)
- Bloomfield Township Library (MI)
- Carlock Public Library District (IL)
- Cary Area Public Library District (IL)
- Chillicothe Public Library District (IL)
- Cheltenham Township Library System (PA)
- Crystal Lake Public Library (IL)
- Des Plaines Public Library (IL) (department-level strategic planning)
- Duluth Public Library (MN) – Every Child Ready Duluth Initiative
- Dunlap Public Library District (IL)
- Elk Grove Village Public Library (IL)
- El Paso District Library (IL)
- Farmington Community Library (MI)
- Fondulac District Library (IL)
- Fossil Ridge Public Library District (IL)
- Fountaindale Public Library District (Bolingbrook, IL)
- Franklin Public Library (MI)
- Helen Plum Library (Lombard, IL)
- Highland Park Public Library (IL)
- Hollis Social Library (NH)
- Holly Township Public Library (MI)
- Indian Prairie District Public Library (Metamora, IL)
- Indian Trails Public Library District (Wheeling, IL)
- Kewanee Public Library (IL)
- LACONI (continuing education consortium in northern Illinois)
- La Grange Public Library (IL)
- Lakeland Library Cooperative (ILS only) (Grand Rapids, MI)
- Lake Villa District Library (IL)
- Lapeer District Library (MI)
- LibraryLinkNJ
- Mahomet Public Library (IL)
- Minnesota Library Association
- Minnesota Multicounty Multitype Library Systems
- Nashua Public Library (NH)
- Norfolk Public Library (NE) Northbrook Public Library (IL)
- Orien Township Public Library (MI)
- Oswego Public Library (NY)
- Otsego District Public Library (MI)
- Paw Paw District Library (MI)
- Peter White Public Library (MI)
- Pinnacle Library Cooperative (IL)
- Plainfield Public Library District (IL)
- Pollard Memorial Library (Lowell, MA)

Library Strategic Planning (con't):

- Portage District Library (MI)
- PrairieCat ILS (northern IL)
- Prairielands Library Exchange (MN)
- Resource Sharing Alliance NFP (central IL)
- Richland Community Library (MI)
- River Forest Public Library (IL)
- River Valley Public Library District (IL)
- Round Lake Area Public Library District (IL)
- Santa Clara City Library (CA)
- Schaumburg Township District Library (IL)
- Southwest Michigan Library Cooperative (MI)
- Spring Lake District Library (MI)
- Three Rivers Public Library District (Minooka, IL)
- Tippecanoe County Public Library (Lafayette, IN)
- Traverse des Sioux Regional Library System (MN)
- The Urbana Free Library (IL)
- Utah Library Association
- Viking Library System (MN)

Library Organizational Capacity Building:

- Addison Public Library (IL) (culture code)
- Broadview Public Library District (IL, community survey)
- Elmhurst College (IL) (Staff retreat)
- Grayslake Area Public Library District (IL) (unified service desk reorganization)
- Grayslake Area Public Library District Foundation (IL) (capacity building)
- Helen Plum Library (Lombard, IL) (culture code)
- Indian Prairie Public Library (IL) (Board and Staff retreat facilitation)
- Indian Trails Public Library District Foundation (Wheeling, IL) (fundraising planning)
- Lillie M. Evans Public Library District (Princeville, IL, focus groups)
- Mahomet Public Library (IL) (fundraising planning)
- Northbrook Public Library (IL) (culture code)

Library Training, Workshop, Webinar, or Coaching:

- Alaska State Library DirLead (director's retreat)
- Bloomington Public Library (IL) (fundraising capacity building)
- Fast Forward Library Leadership Cohort (leadership development program – two sessions annually)
- Herrick District Library (MI) (facilitation)
- Illinois Library Association (Trustee Day programs)
- InfoPeople (webinar)
- LACONI consortium in northern IL (strategic planning workshop)
- Next Level Library Leadership Institute (FL) (coaching)
- Reaching Across Illinois Library System (webinar)

LSTA 5-year Evaluation Projects:

Idaho Commission for Libraries (2021)

Nonprofits (strategic planning facilitation unless noted):

- Champaign County Design and Conservation Foundation (IL)
- Coles County Habitat for Humanity (Charleston, IL, board retreat)
- Coles County United Way (Mattoon, IL, board reorganization and strategic planning)
- Effingham County Museum (IL)
- Family Service of Lake County (IL)
- Fit-2-Serve (Mattoon, IL)
- Illinois Environmental Council / Education Fund
- Illinois Stewardship Alliance (Springfield, IL)
- The James Project (Springfield, IL)
- Kidzeum (Springfield, IL)
- Lincoln Memorial Garden (Springfield, IL)
- Mid Illinois Big Brothers Big Sisters (Effingham, IL division)
- Sugar Grove Nature Center (IL)
- Sullivan Chamber and Economic Development (IL, board retreat and strategic planning)



STRATEGIC PLAN
FY22/23 TO FY24/25

MISSION

We inspire our community to explore and learn throughout their lifetime by providing access to resources, technology, and welcoming spaces.

VISION

A lifetime of learning, growth, and connection.



LIBRARY AWARENESS

District residents are aware of the library's value to the community.

The library is a valued community partner. Maintain current community partnerships while establishing new meaningful partnerships.

The library building is a welcoming and inclusive space for community connections.



LEARN & DISCOVER

Library programs spark exploration and enrich the lives of community members.

Community members have barrier-free access to the collections for a lifetime of reading, learning, and recreation.

Community members confidently navigate up-to-date technology.



ORGANIZATIONAL EXCELLENCE

Staff members feel supported and are given the tools and training needed to be empowered and engaged in their work.

Trustees develop their knowledge and skills to responsibly steward, advocate for, and govern the library.

The library has the systems to plan for and fund the library's building and operations.

BLOOMFIELD TOWNSHIP PUBLIC LIBRARY

2023
-
2025



STRATEGIC PLAN



Bloomfield Township Public
Library

Planning Process

WHY

Bloomfield Township Public Library is a pillar of the community. Patrons love the Library's facility, collections, and customer service. To meet the emerging needs of its patrons, the Library has undergone a strategic planning process to align its resources with the priorities of the community. By implementing a new strategic plan, the Library will be able to focus resources on delivering programs, outreach, and collections for meaningful community connection while expanding innovative services for the community.

HOW

The Library initiated a strategic planning process in the summer of 2022. [Fast Forward Libraries LLC](#) was engaged in July to facilitate the planning process in three phases: Learn, Dream, Do. The Learn phase entailed a community survey completed by 514 members of the community, five community focus groups, 11 interviews, and a Board and staff survey. In the Dream phase, the Leadership Team and Trustees discussed possible future pathways for the library. This strategic plan will guide the Bloomfield Township Public Library through the Do phase, as the Library executes its vision for the future.

Planning Team

- Katherine Bryant, Assistant Director
- Lauren Catoni-Ellis, Assistant Department Head of Youth Services
- Dani Gillman, Library Trustee
- Joan Luksik, Library Trustee
- Tera Moon, Library Director
- Ed Niemchak, Adult Services Librarian
- Anna Pelepchuk, Department Head of Circulation
- Florence Schenk, Technical Services Clerk

Library Board

- Keith Carduner
- Dani Gillman
- Judy Lindstrom
- Joan Lusik
- Joy Murray
- Shane Spradlin



Process Timeline

July 2022 - December 2022

The planning team spent a several months learning about community needs and developing strategies to advance the library's mission over the next three fiscal years.

July

Planning Team Kick Off

August

Community survey; Staff and Board survey

September

Focus groups and interviews; Learning Report; Leadership Team and Board retreats

October

Plan development

November

Plan review and presentation to Board

December

Transition to implementation

VISION

The place to discover.

MISSION

We spark curiosity and imagination by connecting the community to resources, technology, and support.



Strategic Direction 1

ENHANCE OUR CORE

...to create responsive collections, functional and comfortable spaces, and seamless digital experiences.

1.1

Anticipate and develop collections in response to community needs that inform, entertain, and expand world view.

1.2

Reimagine use of library spaces for increased inclusion and flexibility.

1.3

Offer access to innovative technology resources, support, and education to provide robust digital experiences at all stages of life.

Success looks like...

- Increased patron awareness of and satisfaction with collections.
- Improved usage of spaces to meet patron and community needs.
- Expanded availability and usage of technology and digital resources.

Strategic Direction 2

CONNECT THE COMMUNITY

...with each other, with opportunities to be creative, and with new experiences.

2.1

Bring people together around diverse interests and thought-provoking topics.

2.2

Expand opportunities for people and groups to create and explore.

2.3

Deepen engagement with all community members by proactively listening to and learning about needs.

Success looks like...

- Patrons participate in program topic selection and programs better represent diverse patron backgrounds.
- Increased awareness and circulation of non-traditional collections.
- The library is known as a place to create and experience new things.
- Community outreach and partnerships increase awareness and bring new patrons to the library.

Strategic Direction 3

BUILD ORGANIZATIONAL CAPACITY

...for strong operations, satisfying employment, and a collaborative culture.

3.1

Practice learning organization principles.

3.2

Update recruiting, hiring, on-boarding, and retention practices using a diversity, equity, and inclusion lens.

3.3

Cultivate a collaborative culture by focusing how we work together.

Success looks like...

- Staff training and Board learning opportunities increase confidence and better utilize individual and team strengths.
- Transparency and equity are evident in hiring and internal policies.
- Staff and Board create and use guiding principles to increase collaboration.
- Staff and Board feedback is used in decision-making.

After this plan is adopted by the Board, an activity plan will be completed and implemented by staff. Implementation is a continual process. The timing of certain activities will be determined by priority and influenced by various factors, such as funding and staffing. Review and adjustment of the activity plan will happen on a regular basis.

Evaluation of the plan will be ongoing once the plan implementation is underway. Measurements for each goal will vary, and some activities will be best evaluated by things like circulation and cardholder statistics, while others may be evaluated by collecting data through patron surveys at regular intervals. Continued reporting of successes and challenges will ensure that the Library is transparent about progress and open to patron and staff feedback.

Bloomfield Township Public Library commits to a comprehensive review and update of this plan at its completion. This plan will move the Library significantly forward by guiding next steps on plans for core services, diverse community connections, and collaborative culture. This plan is an investment in the future of the Library and its community.

Dunlap Public Library District Community Survey

Dunlap Public Library District invites you to complete this survey so we can learn more about your experiences with our services, programs, staff, and facilities. The library is engaged in a strategic planning process and your responses will help inform our future plans. Even if you do not have a library card or have not visited the library recently, your responses are important for future planning purposes.

All responses are **strictly confidential** and no information will be shared that identifies respondents. The survey report will be used to inform future collections, services, programs, and spaces.

If you have any questions about this survey or would like assistance in responding, please contact Kelly Kerckhove at kkerckhove@dunlaplibrary.org.

This survey should take you about 5 minutes to complete (but feel free to take as much time as you need). Please be sure to review each question (even if you do not respond) and click **DONE** at the end to submit your responses. Your responses are not saved until you click **DONE**. If you close the survey before you click **DONE**, you will not be able to go back to your responses.

Thank you for your time!

* 1. Do you have a library card from Dunlap Public Library District?

- Yes
- Not sure
- No, and I don't have a card from another library.
- No, but I do have a card from another library. Please specify the library below.

2. If you use another library regularly, what do you like about that library?

3. If you do not have a library card or do not use the library, please indicate the reason below. (Check all that apply.)

- | | |
|--|---|
| <input type="checkbox"/> I am too busy to get a card. | <input type="checkbox"/> I don't know what the library has to offer me. |
| <input type="checkbox"/> The library is too far from home. | <input type="checkbox"/> The library doesn't have anything I want or need. |
| <input type="checkbox"/> I do not have transportation. | <input type="checkbox"/> I am unable to pay my overdue or lost item fines/fees. |
| <input type="checkbox"/> I use the library at my school/college. | <input type="checkbox"/> I do not want to pay my overdue or lost item fines/fees. |
| <input type="checkbox"/> I buy my own books, magazines, movies, and music. | <input type="checkbox"/> I use a family member's card. |
| <input type="checkbox"/> Everything I want/need I can get on my phone/tablet/computer. | |
| <input type="checkbox"/> Other (please specify) | |

4. How satisfied are you with Dunlap Public Library District overall?

Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. Please rate how satisfied you are with the following aspects of the Dunlap Public Library.

	Very Satisfied	Satisfied	Neutral	Dissatisfied	Very Dissatisfied
Selection in the library's collections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ease of access to library collections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library facility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Atmosphere in the library	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology available at the library	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Library programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6. What would make it easier for you to use the library more?

7. Please rate the following aspects of the library in terms of their value to you and your family.

	Very Valuable	Valuable	Neutral	Slightly Valuable	Not at all Valuable	Unaware this was offered by the library
Assistance from library staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Print books available for checkout	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Audiovisual items (DVDs, CDs, audiobooks, Blu-ray, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board Games	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
STEM Kits	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
eBooks available for download	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
eAudiobooks available for download	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Streaming movies and TV shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Graphic Novels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Children's programs (ages 12 and younger)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teen programs (ages 12-18)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adult programs (ages 18+)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interlibrary loan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Computers and printers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Photocopier	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Space for personal business/study	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wifi connection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legos/puppet theatre/other kids toys to use at the library	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. If the library expanded, how important do you think the following aspects are in a new space.

	Very important	Important	Slightly important	Not important at all
A separate children's area	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A separate teen area	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programming and meeting rooms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Study rooms	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More space for collections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What else would you like to see in an expanded library space?

9. What programs, services, or collections could the library add that would be valuable to you and your family?

10. We are thinking about where to focus our resources over the next several years. Please rate the items below based on your level of interest.

	Very interested	Interested	Neutral	Slightly interested	Not at all interested
Print Books	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Audiovisuals (DVDs or Blu-rays)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digital collections of eBooks and eAudiobooks (like Libby/Overdrive)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Streaming movies and TV show like on Hoopla	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research databases like Ancestry, Consumer Reports, and World Book Online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increased outreach to the community (like offsite Storytimes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing partnerships with community organizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs for adults aged 60+	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs for adults aged 30-59	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs for adults aged 19-29	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs for teens (age 12-18)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs for children (age 6-11)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Programs for pre-K children (birth to age 5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Virtual programming (like through Zoom or social media)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology for use in the library, such as printers and fax machines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology support (computer classes, WiFi access, one-on-one tech support)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Expanded Library of Things collection with sewing machines, tools, cake pans, and etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More space that the community can use, such as for scout groups, etc.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. If the library expands its world languages book collection, what languages would you like to see expanded or added? (Check all that apply.)

- Spanish
- Polish
- Chinese Mandarin
- Japanese
- Hindi
- Other (please specify)
- Urdu
- Telegu
- Portuguese
- German

12. What program topics would you like to see the library offer? (Check all that apply.)

- Discussions and lectures on current events, civics, and social issues
- Crafting and making
- Green living
- Parenting group, child development program, etc.
- Genealogy
- Support for small businesses
- Mental health programs
- Physical health programs
- Technology programs
- Other (please specify)
- Book discussions
- Writers groups
- Music programs
- Language conversation groups
- Cooking/baking demonstrations
- History
- Gardening
- Finance

13. What are some community needs you are aware of, and how can the library help meet those needs?

14. We are committed to continuing to provide you with the same level of service and have the opportunity to offer more services, programs, and collections. In order to do that, we may need to raise property taxes through a referendum that would allow the library to have more income and expand its building.

How likely are you to vote for a tax referendum to help the Dunlap Public Library District maintain and expand its building and services?

				Would need more information before making a decision
Very likely	Likely	Unlikely	Very unlikely	
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15. What questions or concerns do you have about a possible future referendum to support the Dunlap Public Library District?

16. How do you find out about services and programs at the library? (Check all that apply.)

- | | |
|--|--|
| <input type="checkbox"/> Conversation with library staff | <input type="checkbox"/> Direct email from library staff |
| <input type="checkbox"/> Library website | <input type="checkbox"/> Library social media |
| <input type="checkbox"/> Library Newsletter (email) | <input type="checkbox"/> Social media shared by a friend |
| <input type="checkbox"/> Library Newsletter (print) | <input type="checkbox"/> From a friend or neighbor (word of mouth) |
| <input type="checkbox"/> Flyers in the library | |
| <input type="checkbox"/> Other (please specify) | |

17. What do you think is special about Dunlap Public Library District?

18. What is your age? (Optional)

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-59
- 60-64
- 65-74
- 75 or older
- Prefer not to answer

19. Do you have children 18 or under living in your home? (Optional)

- Yes
- No
- Prefer not to answer

If you are satisfied with your responses, click **DONE** below to submit your survey.

If you have any additional questions or feedback, please contact Kelly Kerckhove at kkerckhove@dunlaplibrary.org.

If you would like to give additional input into the strategic planning process, we are holding in-person and virtual focus groups. Watch the library's website for registration information.

Thank you for your responses.



Farmington Community Library

Learning Report

Submitted by Amanda E. Standerfer, MA, MLIS;
Laura Huddleston, MLIS; and Cindy Fesemyer, MLIS
December 2022

Executive Summary

The Farmington Community Library (FCL) launched a strategic planning process in September 2022. As part of the process, the library devoted a significant amount of time listening to community needs and interests to inform and guide the process. This report represents a summary of the data gathered directly and indirectly using various tools and methods from the community and the library's Board of Directors and staff during this phase of the process. Sections in the report include:

- An introduction and context with library usage statistics and trends and community demographics,
- Summaries of an environmental scan exercise and SOAR analysis (strengths, opportunities, aspirations, and results) that Board and staff members participated in,
- Summary and analysis of findings from a community survey,
- Summary and analysis of findings from a Board and staff survey,
- Highlights from focus groups and interviews,
- A review of other community organizations and strategic plans, and
- An appendix with more complete community demographic data.

Library Statistics

Due to the effects of the COVID-19 pandemic, most library usage statistics dropped in FY19-20 and FY20-21 from pre-pandemic levels but showed increases by FY21-22. Total circulation dipped approximately 47% through FY20-21 from 1,046,946 to 549,132. FY21-22 saw a 51% increase to 831,421 but circulation did not surpass pre-pandemic levels. Digital/e-book circulation increased steadily during this time, however, showing an overall growth of 113% since FY17-18.

Door counts suffered during the pandemic with a total decrease of 87% from FY18-19 (578,071) through FY20-21 (75,011) before showing a 264% increase in FY21-22 (272,902). In-library computer use also decreased significantly, with a drop of nearly 95% from FY18-19 highs, and was slow to increase through FY21-22; wi-fi usage also dipped but recovered well and even exceeded FY18-19 levels at the main branch. Event numbers and attendance decreased 60% and 77% respectively from FY18-19 through FY20-21. Both statistics increased in FY21-22 but remained well below pre-pandemic totals.

Community Demographics

Overall population, median income, and housing values all increased in Farmington and Farmington Hills between 2010 and 2020. Racial diversity also increased, with increases in populations of Asian, Hispanic, and those identified as two or more races in both locations. Farmington Hills also saw a 2.9% increase in Black population. Asian populations in both locations exceed state and federal percentages. College education levels increased in both Farmington and Farmington Hills from 2010 to 2020 in all categories (Associates, Bachelor's, graduate/professional degrees).

Populations of those speaking a language other than English in Farmington and Farmington Hills in 2020 totaled 19.9% and 23.7% respectively with a small increase of those speaking Spanish in Farmington and small increases in Farmington Hills of those speaking Asian/Pacific Islander languages and “other languages.” The number of residents living with disabilities in Farmington and Farmington Hills increased in several categories between 2010 and 2020 with the largest increases seen in those living with ambulatory difficulty in Farmington Hills and independent living difficulty in Farmington.

Environmental Scan and SOAR Analyses

Through a staff survey in September/October 2022, the library’s staff members identified numerous political, economic, social, technology, legal, and library sector issues that could potentially impact the future of the Farmington Community Library. Staff indicated political factors such as growing polarization and extremism alongside economic concerns of inflation and local wealth inequality. Growing concerns about book challenges were noted alongside the idea of libraries as “radically equitable” organizations. The community’s changing economic needs, concerns about millage renewals, and consideration for staff wages were all discussed. Social factors included better representing diversity of cultures and language learning needs, lack of public transit, and reflecting community demographics through library staffing. Considering technology factors such as patrons’ needs for hands-on assistance and continual training for staff, staff members also suggested an aspiration to hire a full-time technology librarian at each branch. Legal concerns included issues of censorship and first amendment rights, handling difficult patrons, and public safety trainings, among others. Finally, staff felt the library sector boasts exciting new trends in expanding and curating collections for diversity and accessibility, balancing digital and physical uses, and exploring new services such as outdoor pick-up lockers.

The staff survey also identified strengths, opportunities, aspirations, and results (SOAR). FCL staff noted their aspirations to provide customized and diverse services in a safe and welcoming environment. Current strengths included diverse programs and collections; strong local partnerships; and knowledgeable, friendly customer service. Staff mentioned opportunities for, among other things, increased services to seniors, increased and improved ESL supports, possible social work staffing, and increased outreach to immigrant and low-income communities. Results included hopes to increase foot traffic and overall usage and awareness leading to a well-supported library with strong connections and an easily renewed millage.

The FCL Board completed a SOAR analysis at their retreat in November and voted on the SOAR topics of most interest. Topics receiving the most votes included current library strengths in staff and board engagement, an overall positive library reputation, and a healthy budget and supportive Friends of the Library. Opportunities noted were varied and included expanding partnerships, studying overall space usage and re-designing outdoor spaces for increased use, and increasing the library’s presence in the community. The Board aspires to achieve a perpetual millage, increase grant funding, and establish a foundation to ensure long-term financial sustainability. A Friends of the Library book shop and a delivery service were both identified as aspirations, as was a Library of Things collections. The Board pinpointed results that include the library becoming the community Welcome Center as well as the library being identified as a “destination” in the community. The Board also wants to see the community listed as one the “best places to live” and noted the possibility of working with local realtors to communicate the library’s value to homeowners and potential community members.

Community Survey

A total of 926 individuals completed a community survey, representing approximately 10% of the FCL service area population. The majority of respondents have a library card from FCL (94.6%) and are very satisfied or satisfied with the library overall (88.94%). Respondents reported being most satisfied with the library's customer service, atmosphere, and facilities. They reported finding the most value in checking out physical materials and getting help from library staff. They also find great value in children's programming, play areas, and collections.

Survey respondents reported feeling very welcome in the library and find the staff to be very helpful and friendly. They shared many ideas about ways the library can update facilities and provided ideas for new program and event topics. Respondents who frequently use other libraries shared reasons they like those libraries, and many respondents shared positive comments about FCL libraries, as well. Several respondents indicated they would like an easier-to-search catalog and easier-to-navigate library website. They would also like a broader selection of e-books and more study/quiet rooms. A large number of respondents (79.34%) reported getting information about the library from the library's email newsletter.

Board and Staff Survey

Seven board members and 37 staff members participated in a survey to gather additional input. Respondents are proud of the library's customer service and welcoming interactions with the public as well as the wide variety of programming offered and their work together as a team. Respondents noted increasing community awareness and engagement as highest importance to the future of the library. Promoting freedom to read and updating library technology rated of high importance, as did keeping staff pay competitive with current market wages. Respondents had a wide variety of suggestions considering future updates to facilities, trainings for staff, expanded outreach, relationship-building between board and staff, and upgrading technology for patrons and staff use.

Focus Groups and Interviews

Focus groups and interviews were held in November to gather additional community feedback about local aspirations and how the library can help meet the needs of residents. Community aspirational themes that arose from the participants included the desire for a higher quality of life, a sense of community spirit, and improved communications. These aspirations were considered alongside the challenges posed and the changes necessary in addressing them. Diverse populations are not well-represented in local leadership, and the communities lack one single point of information for services and programs. Those who wish to get involved, for instance through volunteering, have difficulty knowing where to engage. Aspirations for the library that came to the forefront during discussions included a desire for continued traditional library services, an increased sense of the library as the community hub, and an opportunity for the library to increase community communications and connections. FCL can position itself as a leader in connecting community through collaborations and partnerships as well as providing resources and spaces of value.

Review of Community Organizations and Strategic Plans

Organizations in Farmington and Farmington Hills and nearby cities provide ample opportunities for partnerships which allow the library to contribute its spaces, expertise, and position within the community as a provider of information and enrichment opportunities. The cities of Farmington and Farmington Hills are each working to improve local infrastructure and opportunities that can align with

FCL's community-specific goals. A review of the most recent Community Health Assessment shows what health needs are greatest in the area and how the library might provide information and programs to address these needs. Education, recreation, and healthcare organizations in Farmington and Farmington Hills and adjacent communities are ready partners for reaching a variety of populations and share priorities around racial equity, early literacy, and lifelong learning.

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Introduction

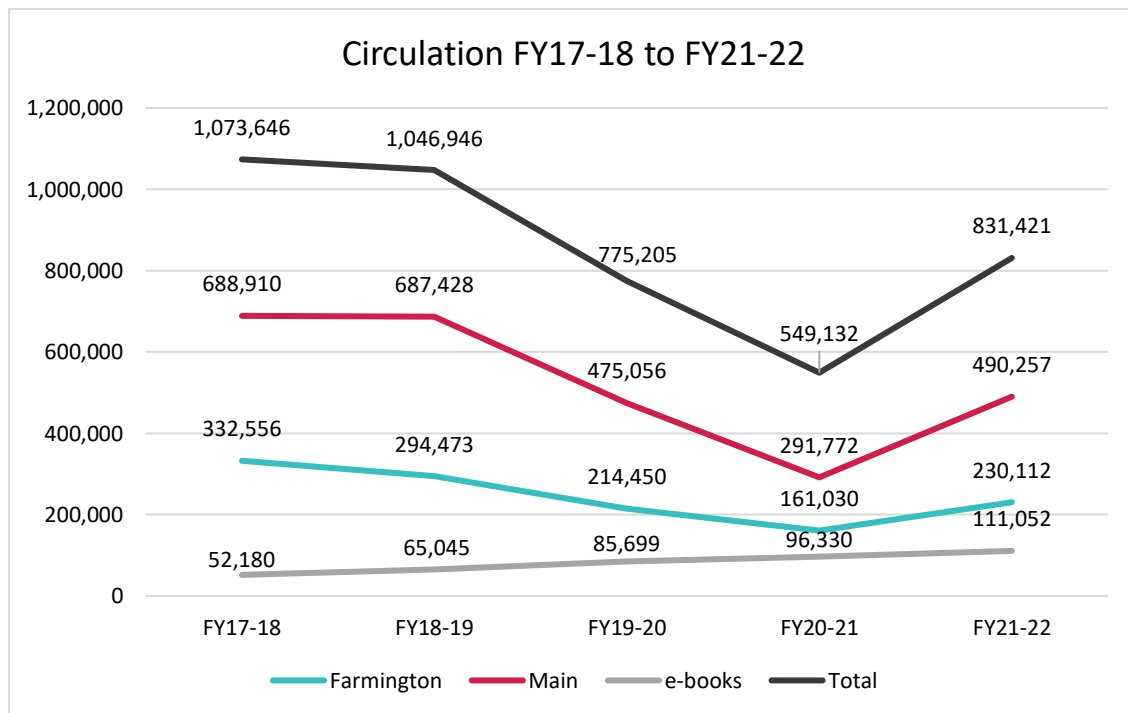
The Farmington Community Library (FCL) serves over 90,000 residents in the Cities of Farmington and Farmington Hills, MI located in Oakland County in the northwest suburban region of Detroit. FCL operates two locations, one at 23500 Liberty Street in downtown Farmington and the other at 32737 W. 12 Mile Road in adjacent Farmington Hills, representing a total of 90,000 square feet.

Farmington Community Library offers patrons access to over 220,000 physical items and over 90,000 digital items. With more than 44,000 active registered cardholders, FCL provides a growing variety of programs, online resources, materials, and services. Interlibrary loan is provided through Michigan eLibrary (MeL), and patrons have access to FCL's Online Learning Hub which provides interactive learning courses, academic databases, and tutoring resources for youth and adults.

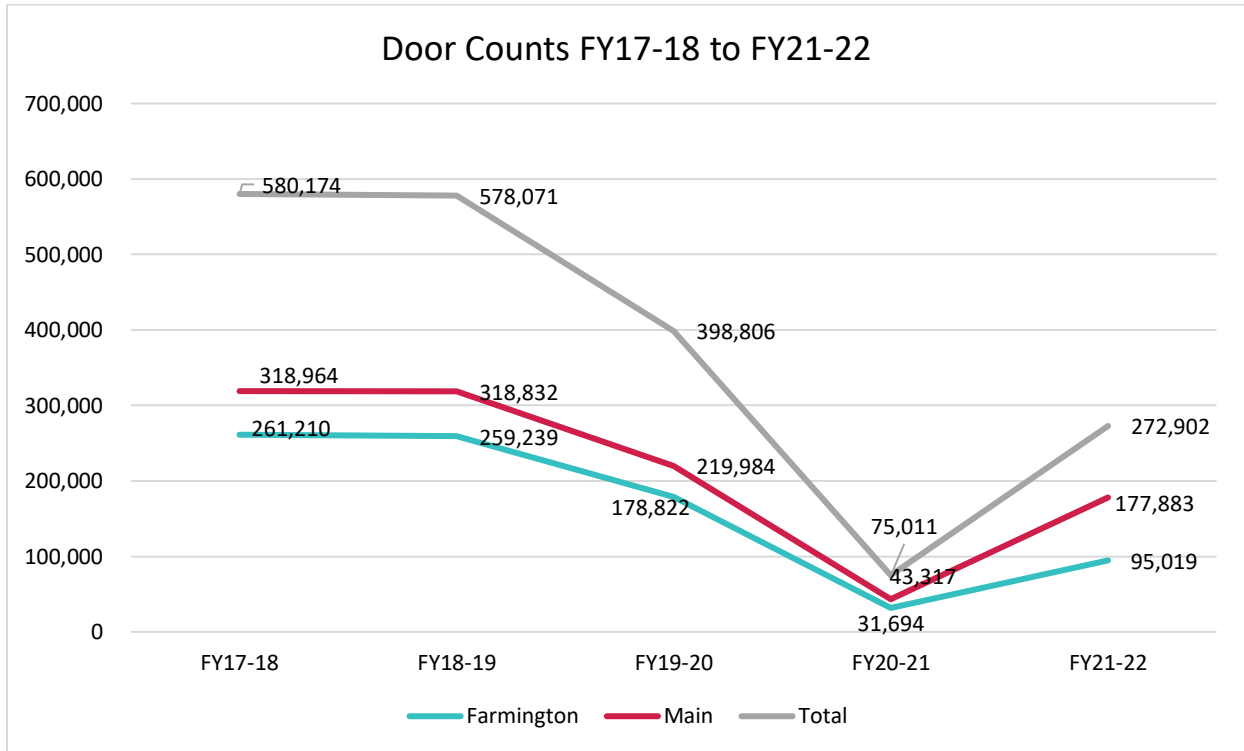
FCL is supported by an active Friends of the Library organization that works to advance the mission and vision of the library as well as advocate for philanthropic funds that enable growth of services and facilities updates. An appointed library Board of 8 trustees (4 from Farmington and 4 from Farmington Hills) serves to govern all aspects of library operation.

Library and Community Data

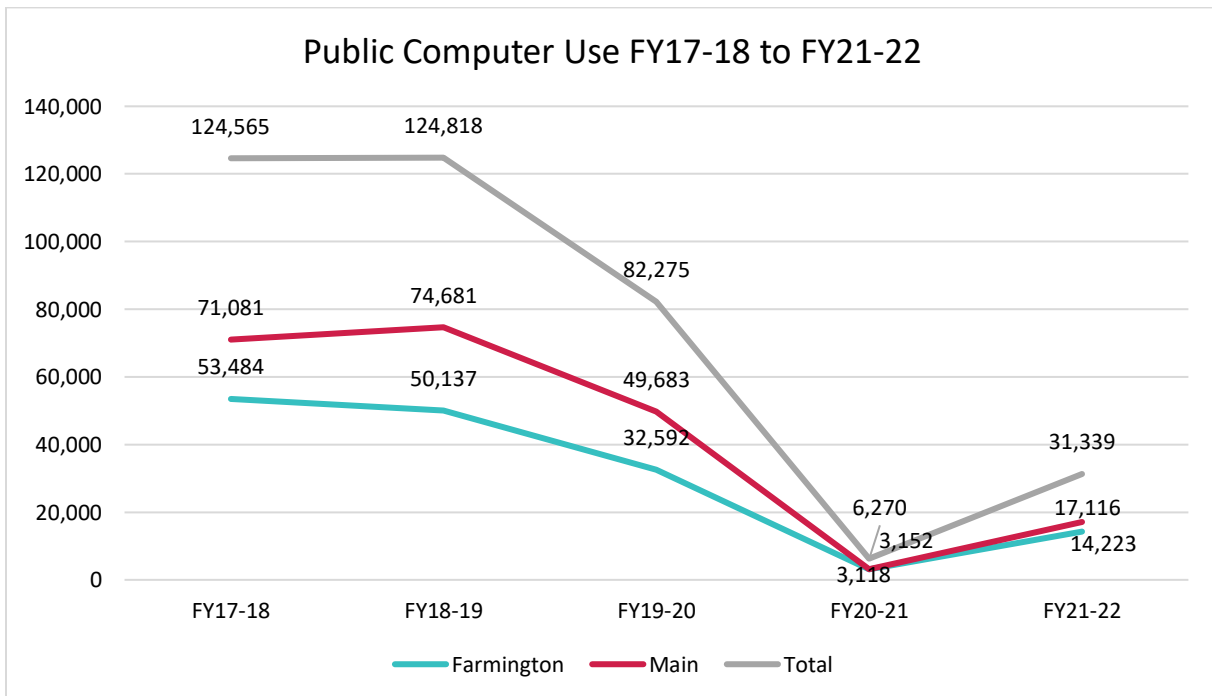
Like other public libraries nationwide, total FCL circulation saw a significant decrease during the COVID-19 pandemic which started in FY19-20. Circulation of e-books, which was already increasing prior to the pandemic, continued to increase to over 111,000 items in FY21-22. Total circulation improved in FY21-22 but did not yet reach pre-pandemic levels.



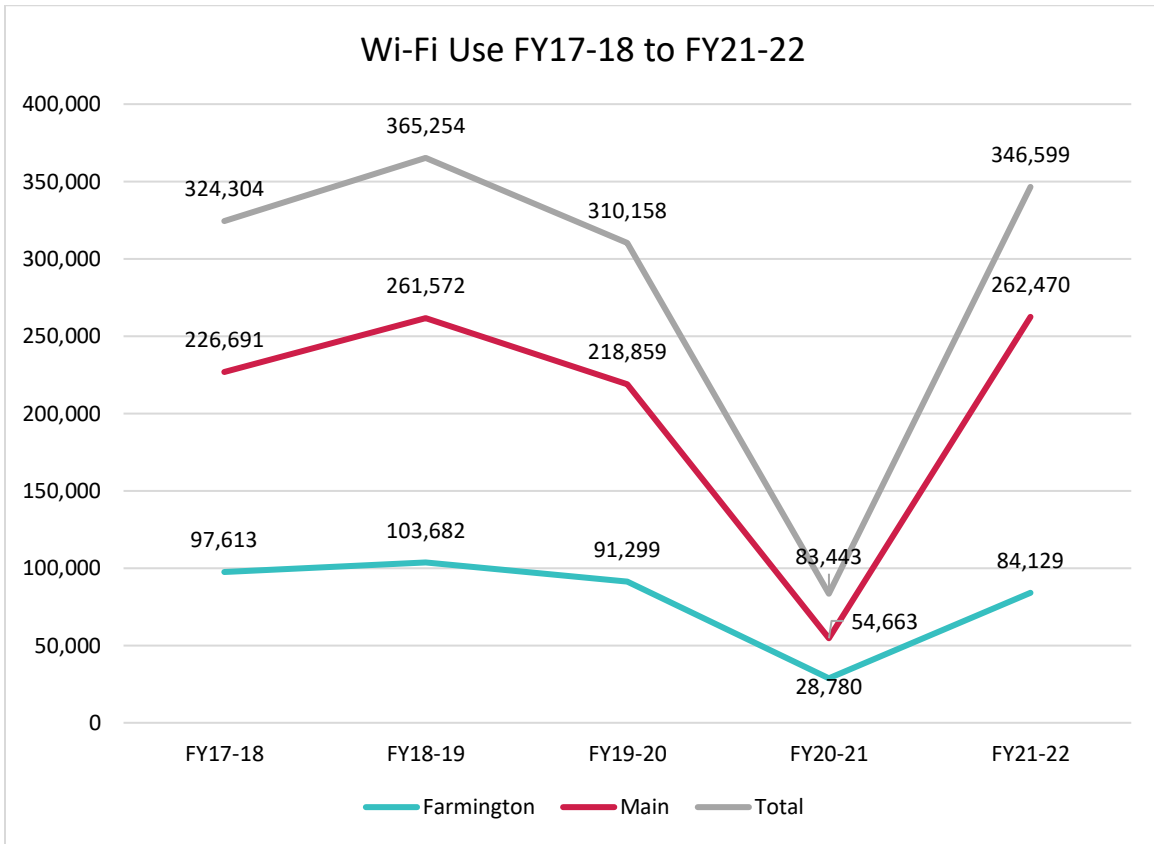
Due to the pandemic, door counts at both FCL locations decreased significantly in FY19-20 and FY20-21. Patron visits to the physical FCL facilities increased in FY21-22 but remained below FY18-19 levels.



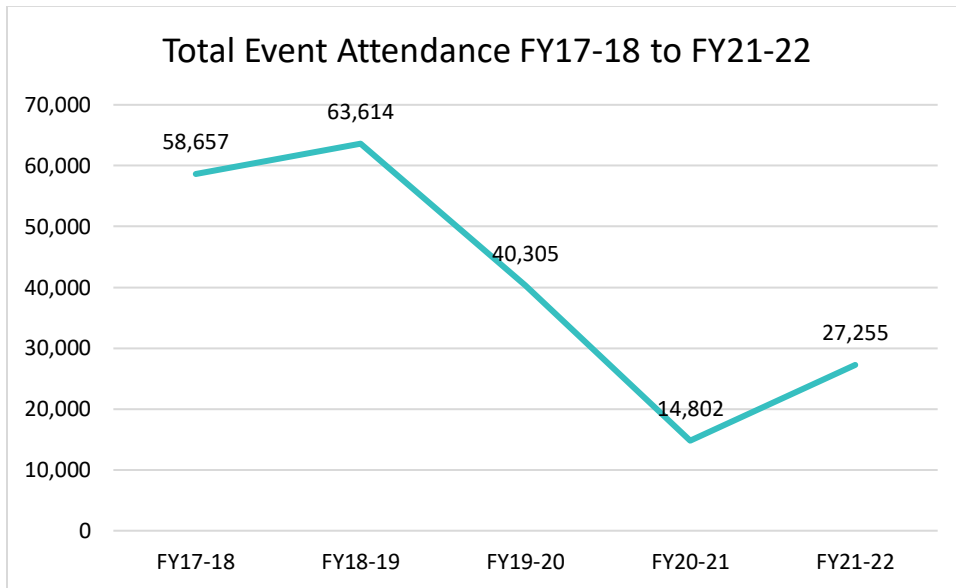
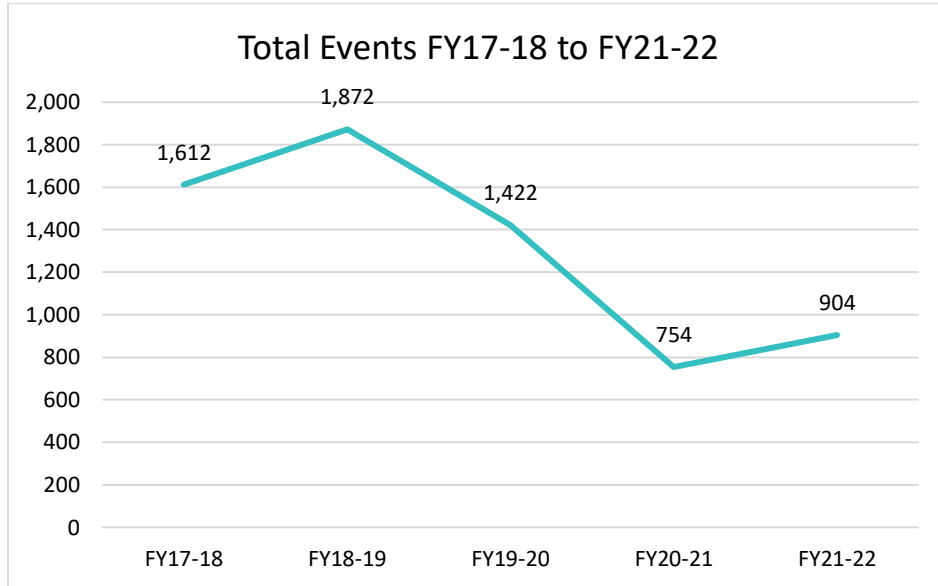
In-house computer usage at both facilities dropped as a result of COVID-19 restrictions. Computer use increased in FY21-22 but remains substantially below pre-pandemic usage.



Use of library wi-fi decreased during FY19-20 and dropped substantially in FY20-21 at both locations. Usage at the main library exceeded pre-pandemic levels in FY21-22 but remained a bit lower at Farmington.



Like other library usage, total events and attendance at events decreased during the height of the pandemic. Both total events and attendance at events began to increase more recently, and FY21-22 numbers show improvement although they remain below pre-pandemic levels.



A variety of demographics for the cities of Farmington and Farmington Hills show changes in the library service population between 2010 and 2020. Overall population increased slightly in both locations, and median household incomes increased 21.7% in Farmington and 25.6% in Farmington Hills. Homeownership decreased slightly from 2010 to 2020 in both locations, but average housing values increased, exceeding both national and state averages. Poverty levels in both locations fall below state and national averages.

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Population	326,569,308	9,973,907	10,380	10,520	80,191	80,937
Median Age	38.2	39.8	39.4	38.2	41.4	42.8
Median Household Income (in \$)	64,994	59,234	64,805	78,875	67,803	85,152
Homeownership	64.4%	71.7%	64.4%	62.4%	65.8%	62.0%
Housing Value (Owner-occupied, in \$)	229,800	162,600	185,000	221,500	238,300	270,000
Below Poverty Level ¹	12.8%	13.7%	9.0%	5.6%	7.5%	6.8%

¹ As defined by the U.S. Census bureau, poverty rate is an annually determined threshold that considers many factors, like family size and various sources of income. In 2020, a family unit of four people had a weighted average threshold of \$20,591. See: <https://www.census.gov/data/tables/time-series/demo/income-poverty/historical-poverty-thresholds.html> and <https://www.census.gov/topics/income-poverty/poverty/guidance/poverty-measures.html>.

Racial diversity increased in both Farmington and Farmington Hills between 2010 and 2020. The percentage of population identified as white alone decreased 3.6% in Farmington and 9% in Farmington Hills. The populations of Black, Asian, and Hispanic residents and those identified as two or more races all increased in Farmington Hills; and the populations of Asian, Hispanic, and two or more races increased in Farmington, as well. The Black population fell 1.5% in Farmington, and the Asian population in both locations exceeded the national and state percentages.

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Total Population	331,449,281	9,973,907	10,380	10,520	80,191	80,937
White alone	61.6%	73.9%	71.4%	67.8%	71.1%	62.1%
Black or African American alone	12.4%	13.7%	10.6%	9.1%	15.6%	18.5%
American Indian and Alaska Native alone	1.1%	0.6%	0.1%	0.0%	0.2%	0.3%
Asian alone	6.0%	3.3%	15.7%	16.4%	11.0%	14.3%
Native Hawaiian and Other Pacific Islander alone	0.2%	0.0%	0.0%	0.0%	0.1%	0.1%
Some Other Race alone	8.4%	2.2%	0.1%	1.1%	0.4%	0.7%
Two or More Races	10.2%	6.3%	2.0%	5.5%	1.5%	4.0%

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Total Population	326,569,308	9,973,907	10,380	10,520	80,191	80,937
Hispanic Population	18.2%	5.2%	2.1%	2.5%	2.1%	2.3%

The percentages of those holding a Bachelor’s degree increased in both locations between 2010 and 2020. The number of those attaining associate degrees (or some college) increased in both locations, as well, as did the number of those in Farmington Hills acquiring a graduate or professional degree. The percentage of residents with graduate or professional degrees and Bachelor’s degrees in both locations are higher than national and state rates.

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Population 25 years and older	222,836,834	6,853,674	7,268	7,932	57,053	59,911
Less than High School graduate	11.5%	8.7%	4.6%	2.3%	6.0%	4.3%
HS or Equivalent	26.7%	28.5%	15.7%	13.0%	17.7%	14.9%
Some College or Associate's Degree	28.9%	32.8%	25.7%	27.6%	24.9%	25.5%
Bachelor’s Degree	20.2%	18.3%	29.4%	35.3%	28.6%	29.5%
Graduate or Professional Degree	12.7%	11.7%	24.7%	21.9%	22.7%	25.7%

In total, nearly 20% of Farmington residents and nearly 24% of Farmington Hills residents speak a language other than English. The populations of those speaking other Indo-European languages and Asian/Pacific Islander languages are higher than state and national rates, rating above 8% in 2020 in both locations. The percentage of those speaking “other languages” in Farmington Hills increased 1.6%, and the percentage of those speaking Spanish in Farmington increased 1%.

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Population 5 years and over	306,919,116	9,405,581	9,649	9,934	76,117	76,819
English Only	78.5%	90.3%	80.2%	80.1%	78.6%	76.3%
Spanish	13.2%	2.9%	0.4%	1.4%	1.5%	1.5%
Other Indo-European languages	3.7%	2.9%	8.5%	8.5%	9.3%	8.2%
Asian/Pacific Islander languages	3.5%	1.7%	9.3%	8.8%	6.3%	8.2%
Other languages	1.1%	2.2%	1.5%	1.1%	4.2%	5.8%
Speaks English less than "very well"	8.2%	3.4%	5.8%	3.5%	6.9%	6.5%

The percentages of residents in both Farmington and Farmington Hills living with disabilities increased in several categories between 2012* and 2020. Those living with ambulatory, cognitive, hearing, and independent living difficulties increased in both locations with the largest increases in ambulatory difficulty in Farmington Hills (3.3% increase) and independent living difficulty in Farmington (3.3% increase).

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2012*	City of Farmington 2020	Farmington Hills 2012*	Farmington Hills 2020
Total Civilian Noninstitutionalized Population	321,525,041	9,866,076	10,323	10,420	79,746	80,572
Ambulatory Difficulty	6.8%	7.6%	2.8%	4.8%	3.2%	6.5%
Cognitive Difficulty	5.1%	6.0%	2.5%	4.7%	3.4%	4.3%
Hearing Difficulty	3.6%	3.9%	1.9%	4.1%	2.8%	3.7%
Independent Living Difficulty	5.8%	6.5%	2.1%	5.4%	3.6%	6.2%
Self-Care Difficulty	2.6%	2.9%	2.6%	2.0%	3.2%	2.9%
Vision Difficulty	2.4%	2.2%	2.5%	1.3%	3.4%	2.1%

*Data taken from 2012 and 2020.

Staff Environmental Scan Summary

An environmental scan considers the broader context in which an organization exists and identifies key issues that potentially impact the future of the organization. To kick off the library’s strategic planning process, elements of the environmental scan were identified through a staff survey in September/October 2022 and are summarized below. 36 staff members participated in the survey.

What Political factors should we consider?	What Economic factors should we consider?	What Social factors should we consider?
<ul style="list-style-type: none"> • Polarization and divide between political parties • Library should remain politically neutral • Library should represent all views, should have materials that represent “both sides” • First amendment “tests” • Book bans and challenges • Local officials who may not support public entities • Library budget could be affected by political and policy-making processes • Library strategic plan should align with Farmington City vision plan • Growing extremism of GOP policies/supporters • Rifts in communities • Some citizens do not feel represented by their representatives • Farmington Area Republican stated they don’t believe in publicly funded community institutions, are anti-tax • Representation/lack of representation of minority groups • Library should provide info re. how to vote, how to find election information • Library could host “civil discourse” group • “Libraries are not neutral, but radically equitable” 	<ul style="list-style-type: none"> • Inflation • Library has to be clear how the taxes paid by residents are benefiting community • Local wealth inequality and diminished middle class • Rising cost of living could push some out of the area • Library should be aware of how cost of living increases affects patrons • Library should show how we contribute to the economic well-being of local businesses and community overall • Return-on-investment (ROI) • Recession looming • Community needs could change in coming years • Range of services at the library should be as broad as possible to meet more needs • Immigrant community living in apartments or multi-family homes and have less access to resources – library can provide some • Library should emphasize cost savings for patrons • Library should provide employment assistance and job search help • Library should consider living wages and realistic staffing for execution of strategic plan • More people working from home 	<ul style="list-style-type: none"> • Some patrons’ native language is not English • Lack of regional public transit • Local income inequality • Food insecurity • Library needs to represent diverse populations, foster cultural enrichment • Library should educate patrons re. social media benefits and detriments • Explore demographic changes of service area • Library should promote community health and well-being • Determine who is underserved • Pandemic-related social isolation and child development • Library needs to make sure all are welcome, none excluded • Offering a wide variety of groups is important • Consider what physical and financial accommodations patrons may need • Consider who else is doing similar work – don’t silo • Library is about more than connections, also value privacy • Encourage employees to make time for self-care through scheduling

<ul style="list-style-type: none"> • Community lacks trust in appointed boards • Issue of election security • People lack info about local elections and representatives • Issue of misinformation • General mistrust around government which spills over to library • Library should consider potential challenges to intellectual freedom when making policies and statements • People feel unsure about the future of politics • Difficulty in relationship with local government • Library could be more communicative about local election results • Concern that rallies and attempted book restrictions will happen before 2024 election • Farmington Area Republicans group member on the FCL board • Competition for library services to forward a political agenda, e.g., The Hawk 	<ul style="list-style-type: none"> • Community economy is steady despite inflation • Address downtown in the worldwide economy through programs/materials, e.g., worth of the American dollar abroad, world markets • Some patrons are not from Farmington/Farmington Hills and may have more service needs • Concerns for the millage renewal • All library programs should be free • Consider transportation and work schedule needs of all patrons • Library needs to consider staff wages commensurate with other employers in order to retain staff 	<ul style="list-style-type: none"> • Balance demographics of workforce to reflect the community • Consider how to reach more underserved patrons, e.g., transportation, mobile library • Consider who “neutrality” benefits • Consider safety in public spaces, e.g., safety from shootings, safety around various identities, both for staff and patrons • Provide unbiased information without picking sides • Consider what languages to provide more materials and programming for • Consider ways to integrate knowledge of other cultures and communities • Library cannot give in to banning books based on religious and political affiliations • Share what staff are reading • Community has a race problem that isn’t acknowledged, tension between wealthy and white people and the many brown and black people • Aim to make the library more of a community partner in Farmington Hills • Concern around mainstream religious fervor
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<p>What Technology factors should we consider?</p> <ul style="list-style-type: none"> • Lack of access for some • Digital divide • Constantly changing • Keeping up with new trends • Providing hands-on help • Digital content more integrated into education • Easy/quick access needed • Library needs to be up-to-date on AR/VR, makerspaces, 3D printing • Providing classes, including basic computer skills • Training staff continually • New public phone in the library • Best apps to use with children • Focus on workshops, e.g., photoshop, coding • Library should have a full-time technology librarian at each branch to help bridge digital divides • Session on popular resources, e.g., Hoopla, Libby • Budget to address all tech needs at the library • Plans for tech obsolescence, e.g., DVD and CD collections • Some don't have hardware/devices need to access digital library • Technology innovation, e.g., wind technology, water desalination, space innovation • Staff training on Teams • Prevalence of apps and access to cell phones • Make sure our tech is as up-to-date as possible 	<p>What Legal factors should we consider?</p> <ul style="list-style-type: none"> • Library privacy act refresher • Addressing first amendment rights and censorship in all forms • How to handle difficult patrons • Accommodating patrons who have special needs • Securing patron privacy • Upholding core principles of intellectual freedom • Gender/sexual identity discrimination concerns • Racial discrimination concerns • Changes to how library board members are selected • Millage funding • Active shooter and Stop the Bleed trainings annually • Board should be functional, efficient, fully transparent, and respectful of staff and patrons. • Building safety • Personal information and potential liabilities • Publishers and e-material battles; digital content purchase and delivery concerns • Making it clear that we cannot offer legal, tax, or medical advice • Net neutrality • District vs. city library differences • How much power does the board legally hold? 	<p>What Library Sector factors should we consider?</p> <ul style="list-style-type: none"> • Library of Things • Quiet, flexible work/study spaces • Being prepared for censorship/book bans and first amendment audits • Less patrons in-person than previously • Increased use of libraries as meeting spaces, collaborative spaces • Digital literacy skills training • Digital collections growth • Curated collections for specific needs and populations • Creative outdoor space uses • Better accessibility and programming for those with disabilities • Considering diversity of the community • Concern for safety in larger groups • Curbside/pick-up services • Considering inclusion and diversity in hiring • General library advocacy • Outdoor lockers for pick-ups • Satellite locations • DEI collection analysis • Job training resources • Makerspaces • Evolving the library's image with the public • Book/materials vending machine • More classes of all kinds • Impact of social media • Interactive, informational "boards" to grow awareness • Programs for young adults on emerging adult/life skills
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Staff SOAR Analysis

A SOAR analysis (**strengths, opportunities, aspirations, and results**) narrows the focus from an environmental scan to consider the organization specifically. This exercise helps identify potential directions to explore during the strategic planning process. SOAR elements were identified during a staff survey in September/October 2022 and are summarized below. 36 staff members participated.

<p>Strengths – What are we good at? What are we known for?</p> <ul style="list-style-type: none"> • Customer service: go the extra mile; warm and welcoming; dedicated; wide variety of knowledge; accepting of diverse population; cheerful; helpful • Programming: variety of programs and audiences; early childhood programming and storytimes; people come to programs from surrounding communities; amazing MLK Jr. Day celebration annually; great ESL sessions • Strong partnerships: local schools; nonprofits; businesses; social service organizations; Battle of the Books • Collections: large selection; circulation stats increasing; overall good collection; great international language and film collection • Technology: strong tech services through computer and website; office services (fax, copy, scan) • Overall: good at saying “yes” internally; good at self-analysis and taking steps to make changes; showing up in the community; being open and accessible; fine free; 2 buildings with different “feel”; non-judgmental; “not a stuffy library;” good outreach 	<p>Opportunities – What does our community need? How can the library meet those needs? What issues do we need to address?</p> <ul style="list-style-type: none"> • Programs: listen to patrons and provide programs they want; partner with organizations such as the nature center for programs; language and cultural programs; fun, relaxing classes where new skills can be learned; continue computer classes; parenting programs • Services: increased services to seniors, e.g., delivery, tech help; increased awareness of diversity and needs/resources for different groups; better ESL services/support; social work staff/services (if that is determined to be our role); mentoring and tutoring; disability resources • Collections: listen to patrons and order materials they want; rental/check-out of tools and other expensive household products • Outreach: letting community know what we offer; reach out to more migrant communities, go to where they meet; reach out to business community re. library cards for staff; better connect teens with their community/world; connect with low-income community and non-users; more marketing to non-English speakers; more partnership with Farmington Hills community; better marketing of online learning hub • Facilities/Spaces: promoting the library as a safe space for marginalized communities, e.g., LGBTQ+ tween reading group; provide gathering spaces for meaningful dialogue; an apolitical (but not neutral) space; update bathrooms and other physical spaces for better disability accessibility; more private work/study spaces; quieter staff spaces; more meeting/gathering spaces; warm, welcome environment where individual needs are considered
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	<ul style="list-style-type: none"> • Other: better public transportation to the library, for individuals and groups; get more young people involved in the Friends of the Library; hiring diverse staff; more staff; library as leader in information, tech, education, and social awareness; more transparency with the community; educate people to evaluate information for bias and truth; support the social-emotional needs of school-age children; support small businesses; ensure staff compensation is not a barrier to retention
<p>Aspirations – What do we aspire to do as a library? What could we do that would make our community stronger? What are our hopes for our community members? What do we want them to aspire to?</p> <ul style="list-style-type: none"> • Users/Access: aspire to have something for everyone; want people to know what is available and how they can use it all; we want people to have fun here and love the library; provide users with the freedom to access and learn what they choose; more recorded programs for Zoom access • Community: anticipate and respond to needs in the community; hope the community will be strong and educated critical thinkers that inspire others outside the community; aspire to reach every member of the community; help to maintain education and creative energy in the community; a place to link local businesses and schools for better training; people feel like they're part of a vibrant, positive community; people feel a sense of ownership and connection in the library; help people become productive citizens; the community aspires to be more inclusive and welcoming; an empowered community is a successful community; as we meet the needs of the community, the community will value our work; thriving community creates space for all members; community is connected and supported; community feels like they have a say in library updates/improvements; aspire to create a community of diverse, lifelong library users • Programs and Collections: customize to meet various populations' needs; timely programs; 	<p>Results – What do we hope to achieve? How will we know we've achieved it?</p> <ul style="list-style-type: none"> • The library, overall: is accessible to and used by those who currently don't use it; has increased foot traffic; is a vital part of the community, a place for cultural resource sharing, learning, and civic engagement; conducts regular patron and staff feedback surveys and uses benchmarks to measure results and make changes; is a relevant organization; supports growth and prosperity of the communities; is supported through easily renewed millages; is respectful, law abiding, and compassionate to patrons and staff; has connections with city council and school board to discuss community trends; has a strategic plan that represent community needs and wants; gets positive feedback and smiles; is a stronger voice in the community; sees more diversity in patron base; is constantly achieving its aspirations; is essential to the daily lives of our patrons; is considered one of the top libraries in MI; reports increased usage numbers over the next several years; regains what we lost during COVID • The community: is aware of library services through targeted marketing and branding; supports the library through renewed, increased millages; continues to partner with the library • People/patrons: become repeat users of the library; stop asking about late fees; find what they want/need; feel valued and feel they have an inclusive library; think of the library first for information needs; make positive comments about the library on social media

<p>educational classes; history programs; movies; conversations; helping patrons learn new skills and land jobs or start businesses; more social events for people of all ages</p> <ul style="list-style-type: none"> • Outreach: seek to meet current non-users where they are; aspire to address the mindset that some think they don't need the library (so don't want to pay for it) and show the needs that are being met at the library; everyone should know where the library is; library should be a household name and first place people think of; meet people where they are in terms of life stage, economics, location • Facilities/Spaces: aspire to be a safe place for people to gather, learn, pursue interests; want all to be welcomed and appreciated; want the library to be a welcoming place and vital resource; people are comfortable using the library; the library as "the living room" of the community; space available for private work/study • Staff: aspire to collectively move forward; staff are supported, respected, and rewarded; aspire to be an adaptable workplace • Other: think outside the box; test new ideas; be innovative and creative; increase our impact on educational advancement, literacy, and job/economic growth; be an accepting presence as an example to the community and a positive identity that they can emulate; promote education and entertainment for balance; to value and celebrate different opinions and experiences 	<ul style="list-style-type: none"> • Staff: have an understanding that the world and the library have evolved, processes change, and change is part of life; have a more inclusive work environment; continue to be approachable; is easily/highly retained • Facilities/spaces: are interactive and not quiet (but also have quiet spaces for those who need them); are busy; have enjoyable environments; are used as social spaces and lifelong learning; • Services: are tailored and meet evolving needs; are streamlined, intentional, and meaningful • Programs and Collections: have increasing attendance; have increasing circulation
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Board SOAR Analysis

SOAR elements were identified during a retreat with the library Board in November 2022. Board members did a gallery to “vote” on their top priorities in each category. Topics that earned votes from a majority of Board members are summarized below.

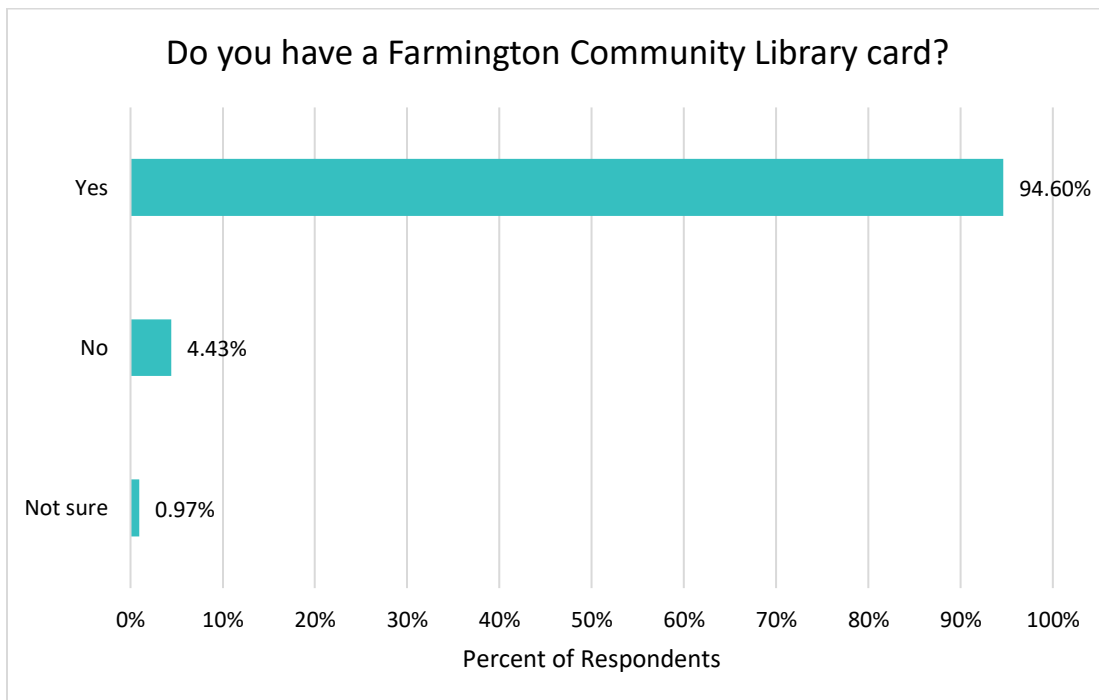
<p>Strengths</p> <ul style="list-style-type: none"> • “Jewel” of the community • Great leadership team • Early literacy support in the library and for home • Staff engaged in community • Good partnerships with schools • Engaged board • Great social media engagement • High staff integrity – professionalism • Library information is transparent and accessible • Great website • Welcoming to teams • Good reputation inside and outside the community • Generous budgets • Very supportive Friends of the Library 	<p>Opportunities</p> <ul style="list-style-type: none"> • Better utilize/re-engineer outdoor spaces • Expand partnerships • Provide fuller patron experience in building • Create volunteer opportunities • Facilities improvements including signage, continuous improvement, space utilization study • Outdoor interactive signage • Additional access points are needed • We still have a lot of people to reach • Modern living trend programming, i.e., crypto • Increased library presence in the community • Showcase staff more • High school kids get credit for working at library
<p>Aspirations</p> <ul style="list-style-type: none"> • Perpetual millage • Foundation to help build library's long-term legacy • Green certified • Outdoor program space • Increased grant opportunities • Increased business Partnerships and sponsorships • Used book sales – Friends of the Library shop that looks like a bookstore either in or outside of the library • Library delivery like Amazon • Library of Things • Pass next millage 	<p>Results</p> <ul style="list-style-type: none"> • Become <u>the</u> Welcome Center for new folks and recognized for it by outside professionals • FH back on “best places to live” list • State-of-the-art building • Results tie back to literacy impacts– tracking with schools • Perpetual millage • We are a “destination library” • How does the library boost real estate values– partner with local realtors

Community Survey Summary and Analysis

As part of their strategic planning process, the Farmington Community Library (FCL) conducted a SurveyMonkey survey to learn more about their patrons' experience with library services, programs, staff, and facilities. A total of 926 individuals completed the survey, representing approximately 10% of the FY20-21 service area population of 90,112 residents.

Notes about the survey responses:

- Respondents sometimes note programs or services they want the library to have but are already offered by the library. We have left these comments in the responses. This indicates an opportunity to better communicate about all the library has to offer. In addition, respondents sometimes offer conflicting opinions about what the library should offer or feel strongly about the library offering something that is not feasible due to cost.
- For open-ended questions, responses are summarized and not in any particular order or with any particular weight except where explicitly noted. When analyzing this qualitative data, we hoped to show the breadth of responses provided by respondents.



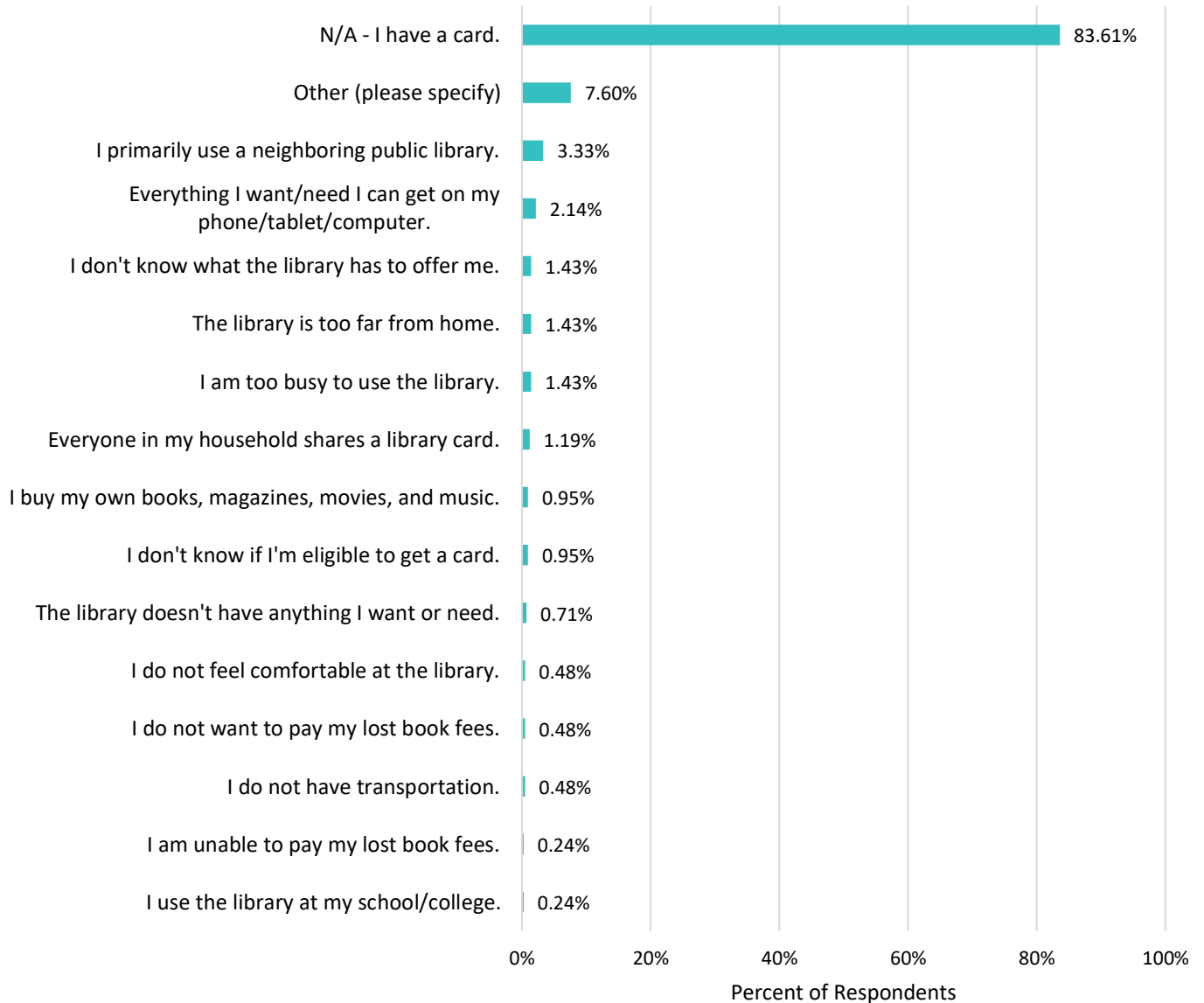
FINDINGS:

- The majority of respondents (94.6%) have a Farmington Community Library card.
- "I have a card from another library" garnered 74 comments, summarized below.

“I have a card from another library. Please specify the library.”

- Arenac County
- Baldwin
- Belleville
- CADL
- Detroit
- Franklin
- Hamtramck
- Hazel Park
- Howell
- Kalamazoo
- Library of Michigan
- Livonia
- Loutit District Library, Grand Haven, MI
- Moore Public Library, Lexington, MI
- Northville
- Novi
- Oak Park
- Oakland Community College
- Redford
- Southfield
- Troy
- West Bloomfield
- Westland
- Others: Brooklyn, NY; Chicago; Fort Myers Beach; Lee County FL

If you do not have a Farmington Community Library card or do not use the library, please indicate the reason below.
(Check all that apply.)



FINDINGS:

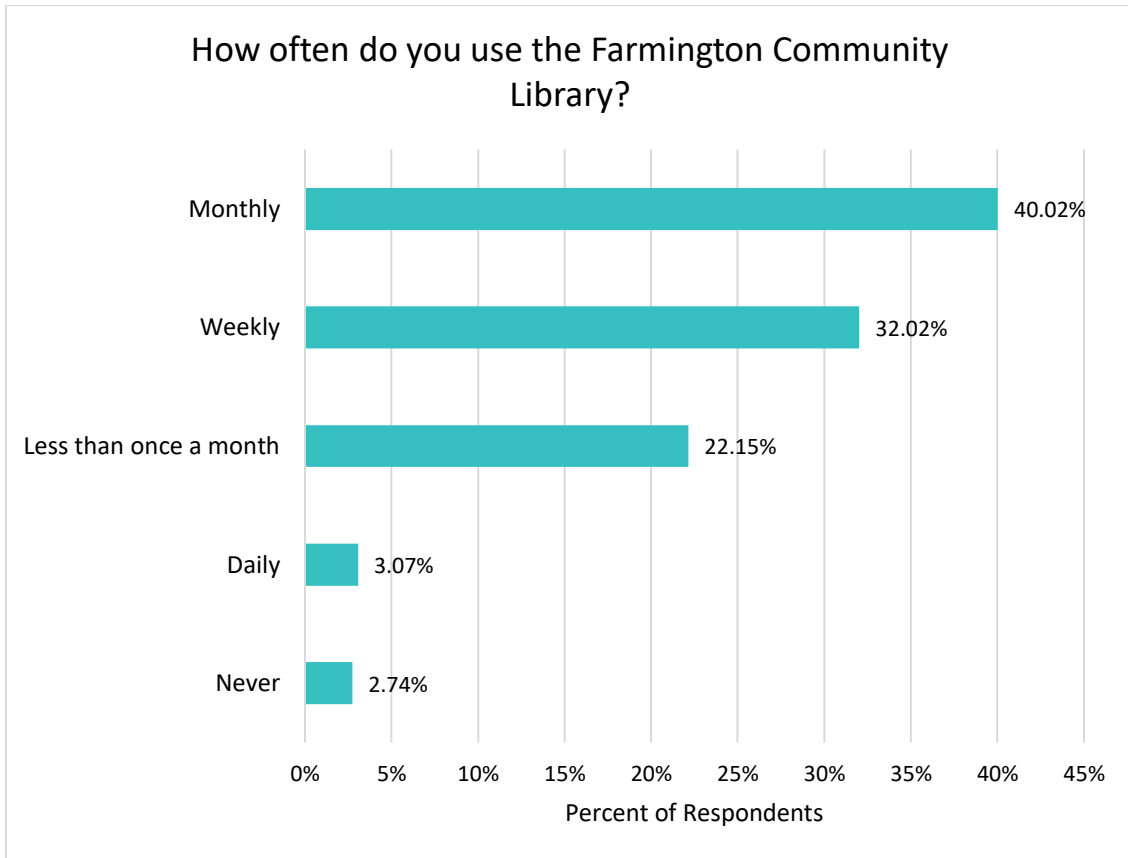
- The majority of respondents (83.61%) noted they have a card.
- Very few respondents noted a listed reason they don't use the library or don't have a card.
- 7.6% of respondents listed other reasons for not using the library or having a card (noted below).

Respondents shared other reasons they don't have a library card or use the library:
<p>Respondents shared reasons related to accessibility/library hours:</p> <ul style="list-style-type: none"> Library hours don't match my availability; Not able to get to the library to renew my card; would like to be able to renew my card online; I had a card but it was removed; tried to get a new card but was turned down as I didn't have the old one; would use curbside downtown in the evenings if it were available; hard to find time after work on weekdays
<p>Respondents shared reasons related to the pandemic:</p> <ul style="list-style-type: none"> Hard to share books post-Covid; Covid has kept me home
<p>Respondents shared additional reasons for not having a card or using the library:</p> <ul style="list-style-type: none"> The atmosphere is austere, makes me not want to stay; typically buy what we need; I'm a slow reader; the holds on the books I want are too long; poor e-book selection; need a Spanish conversation group; past fighting over use and management discouraged me from using

If you frequently use another public library in the area, please indicate which library and what you like about that library.
<p>West Bloomfield: Fun and updated children's area and play space; storytime and music time; lots of study rooms and good study rooms policy; proximity; atmosphere; children's books by grade level and school district recommendations; more new release books; selection of books on CD; more travel books; more nonfiction; availability of new books and CDs; a bit cleaner here; comfortable; updated computers and furniture; convenient hours; well-organized; quiet and conducive to working; staff is helpful; grandkids/kids have school connections here; use the facility as an ESL tutor; better digital selection; overall collection selection; good resale shop for books; better display of collection; updated and aesthetically pleasing; wide selection of videos; new book check-out period (3 weeks); STEAM cart activities</p>
<p>Canton: Separate and organized used book space; proximity; good selection</p>
<p>Northville: Downtown location is walkable/accessible; higher community profile; adjacent to civic campus; easier to access; broader scope of new books; friendly staff; nice ambience; good parking; good collections; quick holds; well-organized used book space</p>
<p>Livonia: Digital offerings; art gallery and opportunity to display art</p>
<p>Bloomfield Township: Good selection of new materials; conveniences; book sales; adaptive materials in children's dept.; multiple study spaces; deeper fiction collection; more upscale nonfiction; respectful staff; well-curated collections in broad interest areas; to use Family Search History Center (Salt Lake, UT) resources; warm/quiet/beautiful space</p>
<p>Sandburg: Homey and quaint; proximity</p>
<p>Novi: Outside patio; coffee area; more quiet study rooms; more copies of new releases; modern facility; part of the library network; great used book section; programs; free COVID home tests; cultural presentations; Icube Room (Makerspace); overall layout; to-go kits; book bites sessions; reading incentives</p>
<p>Howell: Proximity</p>
<p>Troy: Libby selection is more comprehensive</p>
<p>Franklin: Proximity</p>
<p>Southfield: Garden class; availability of materials; wide selection of videos; lots of staff available for questions; sleeping dragon; friendly to minorities</p>
<p>Commerce: E-book selection; proximity</p>

Redford: Free movies once a month; seed library; have a lot I am interested in; children’s area and programming; proximity; good selection; drive-up window
Detroit: More options through Libby; proximity
Royal Oak: Proximity; good selection of new books
Ferndale: Proximity; good selection of new books; cozy Mommy nook
Birmingham: Puppets
Douglas/Saugatuck: Great activities
Traverse City: Large collection of STEM toys and manipulatives
Genesee: Digital audiobook selection through Libby
Plymouth: Large number of study rooms
Lansing and Port Huron: Genealogy research
Others listed without reasons or in a list with collective reasons:
<ul style="list-style-type: none"> • Auburn Hills; Huntington Woods; White Lake; Baldwin; DeTour School; Public Library Online; Great Lakes Digital Libraries; Wixom; Hazel Park; Wayne State; Gran Valley State; University of Michigan; Paw Paw; South Lyon

Additional comments about Farmington and Farmington Hills “12 Mile” Branch:
<ul style="list-style-type: none"> • “I was delighted to return to F.H. and be able to again use Farmington/F.H. libraries with their friendlier atmosphere.” • “[At 12 Mile] I like the study spaces (the enclosed desks, the quiet rooms), and the larger kids and language section (also trying to find more books in French.) The comfy chairs near the movie section are also amazing. Downtown, I like the fireplace, the current puzzle section (I like to put a piece in when I come). • “I love story time at the Farmington Library!” • “I actually like Farmington Hills better [than another library] because the staff is more helpful and more friendly.” • “We are dedicated fans of the Farmington Community Library.” • “...I frequently go to the Farmington/Farmington Hills Libraries because I enjoy the library, its events, and staff.” • “Farmington Hills (12 Mile), [is] organized, clean, convenient, friendly staff/volunteers.” • “12 Mile Branch, [I like the] children’s area and selection, movie selection, displays/recommendations.” • “[FCL Downtown], I live in the neighborhood and love walking there with my daughter! Most of the librarians are so welcoming and helpful. I can always find reading level-appropriate recommendations for my child.”



FINDINGS: • 72.04% of respondents use the library monthly or weekly.

What would make it easier for you to use the library?

Multiple respondents shared the following suggestions:

- **Collections:** Decreased wait time for holds and/or more copies; better/larger selection of new books; more digital titles through Libby/larger e-book selection; more digital audiobook titles and copies
- **Services and Technology:** More user-friendly online catalog; more flexible search functions in catalog; an app to search for books and save them in a list; website changes have made it more difficult to find/reserve materials
- **Facilities and Spaces:** More quiet/private study rooms; more quiet spaces, in general; better signage for sections or a map/directory; rain shelter over bike racks; larger children’s play areas; drive-up window
- **Access and Hours:** Longer hours; longer Saturday hours; longer Sunday hours; longer weekend hours; delivery of materials for homebound; more convenient public transit/bus/walking routes

Respondents had additional suggestions related to **events**:

- Weekly music or art time for preschoolers; periodic entertainment, e.g., Java and Jazz; more kids programs; more sections/openings for kids' programs; more family programs; one-day workshops; saving seeds; genealogy how-to programs; computer how-to programs; yoga

Respondents had additional suggestions related to **collections**:

- More nonfiction sports books; more recommended books; book bundles; more children's Braille books; QR codes near the video games and movies to request specific titles; easier way to see status update on holds; more traditional Islamic and Arabic literature; more authors I'm interested in; more music CDs; organize the fiction section by genre; more toddler books; more business/leadership titles, e.g., titles by Adam Grant; more and newer nonfiction, e.g., biography, watercolor, sketching, how-to; board book holds; confusing new placement of books; more and updated travel guides; more titles available through ILL; digital books compatible with Kindle paperwhite

Respondents had additional suggestions related to **services and technology**:

- After-hours hold pick-up lockers; free use of Adobe suite products; remote help using Libby; more available tech help for computer/iPad questions; coffee service; links to series from catalog entries; cover images of every title in catalog; easier use of Kindle content; advertise programs in Farmington Facebook groups; easier checkout system; digital copy of library card; a way to retrieve your card number and password online if you forget them; expanded Friends book sale; an easier way to search kids' books by topic/theme; offer shopping carts/trolleys; librarian curated check-out "stack" for children for pickup; in-person or virtual library orientation; reference desk service online; ability to search via secure website; Ancestry site available off-site; auto-notification if books are on hold or past due

Respondents had additional suggestions related to **facilities/spaces**:

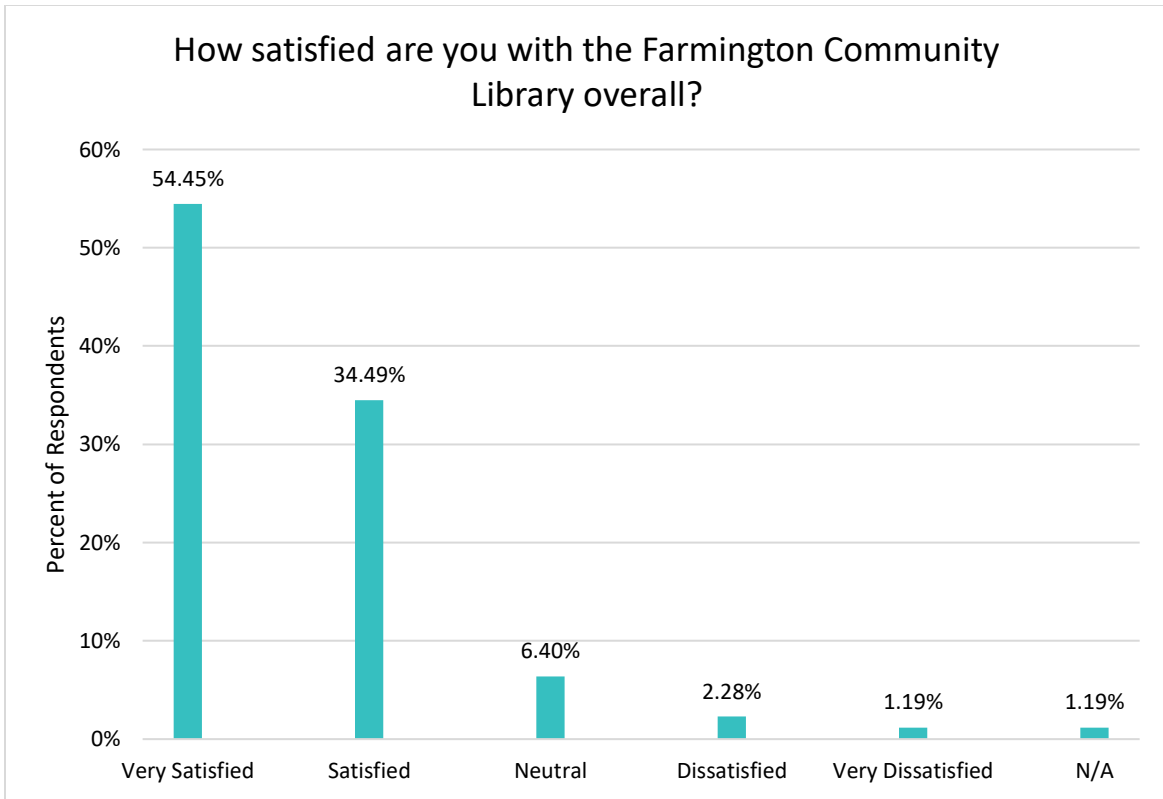
- The ability to reserve study rooms in advance; more public small meeting spaces; change in atmosphere; more parking at downtown branch; more handicap accessible parking changing tables in both downstairs bathrooms; better bike racks; additional location closer to underserved populations; more comfortable spaces; larger bathrooms in children's department to accommodate strollers and more child-friendly bathroom accommodations; non-upholstered chairs ("more sanitary"); more charging stations; more comfortable seating in lobby; updated carpet and flooring; comfy seating upstairs for doing homework; larger library in Farmington; more contained children's area so children cannot wander off; better overall arrangement; more comfortable chairs in vending area; less steep ramp outside the main library; automated return slot is often out of order

Respondents had additional suggestions related to **access and hours**:

- Longer Friday evening hours; later evening hours, e.g., 9PM at least one evening; earlier weekend hours; text reminders for upcoming due dates, holds, etc.; waive fees; information in various languages; allow a family member to pick up my holds without my card; curbside pickup; more curbside hours; text function for curbside pickup; phone prompt to direct to children's department; access for those who don't live in Farmington; remote card renewal for homebound patrons; 24-hour grace period after due date before late fee is charged; auto-renew for items not requested by others; shouldn't have to confirm my library card with my ID every year

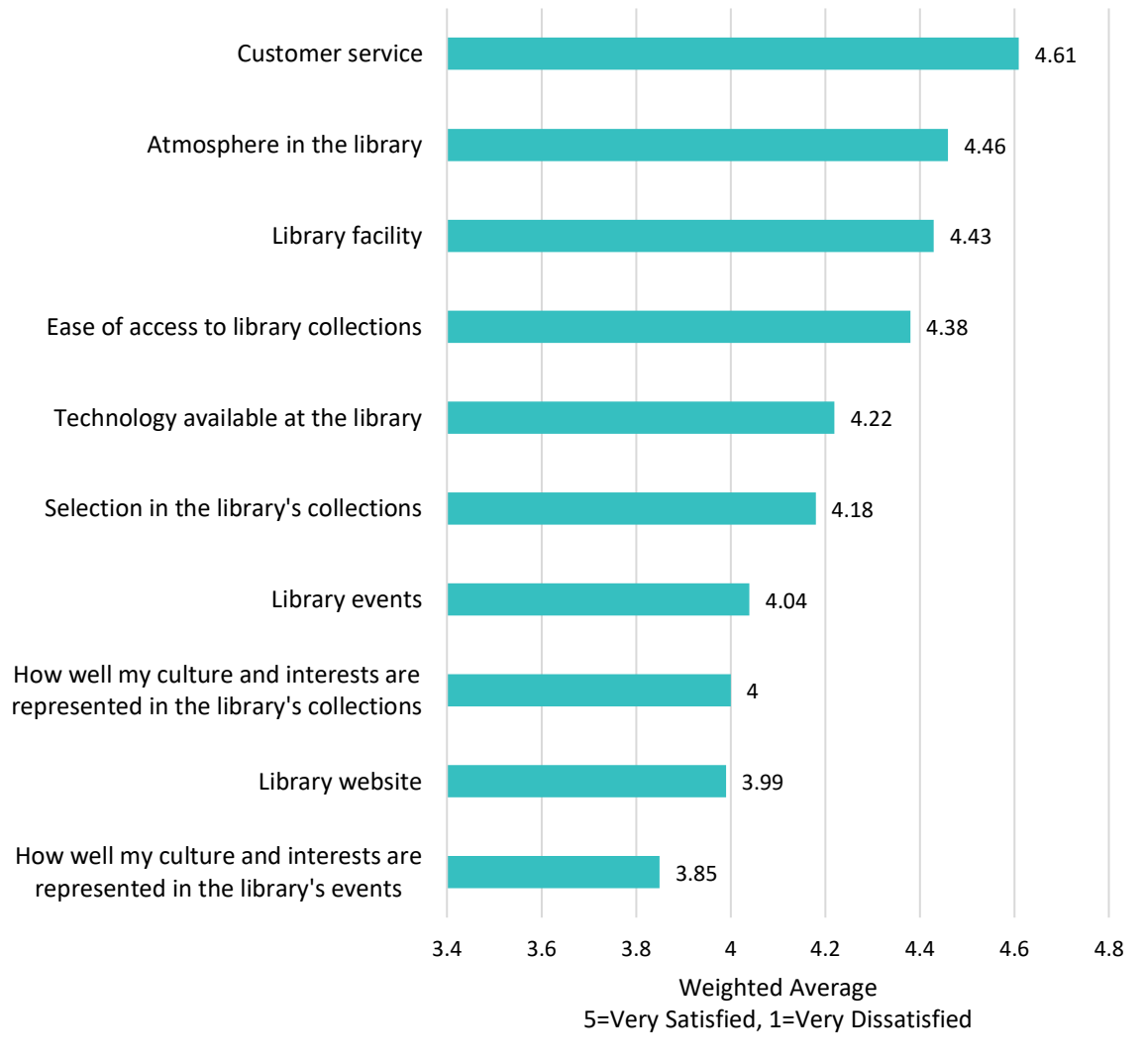
Respondents had **other general suggestions and comments:**

- Busyness/time/my current schedule, in general; if others would wear good masks when in public; end to the pandemic; more approachable staff; staff greeting/welcoming patrons; give reasons for when books are removed from the library; more diverse employees; no more facemasks or other COVID measures; friendlier to minorities; wish I could be comfortable leaving my things behind when I go to the restroom; items are frequently mis-shelved making them hard to locate; make sure all items turned in get checked-in; less downtown construction; if I could bring my small dog with me; “unfriendly” sign about phone calls at Farmington Hills;
 - “Keep clerks at the circulation desks! When I check out various things, it is hard to self-check out when I am with my 3 kids 5 and under.”
 - “It would be nice if Farmington could request books from other libraries if all their copies are out.”
 - “Promote the days when books can be donated to attract better book selections for resale.”
 - “The politics around employees and technology security issues and board members, paired with COVID-related politics have made me not want to visit the library. It used to be a fun place to escape all that.”
 - “Wish the library didn’t need to rely on the revenue generated by late fees.”
- **Many respondents noted that the library is easy to use, they have no problems, and feel the library is very accessible and user-friendly:**
 - “The library is extremely easy to use!”
 - “Keep up the good work!”
 - “It is very easy and pleasant to use now.”
 - “The auto-renewal is an excellent notification.”
 - “You already make everything very easy! Thank you!”
 - “You’ve made things extremely user friendly and staff is helpful.”
 - “I think you are doing a great job displaying the books.”
 - “You guys are already wonderful.”



- FINDINGS:**
- The majority of respondents (88.94%) are very satisfied or satisfied over with the library.
 - 3.47% are dissatisfied or very dissatisfied overall.

Please rate how satisfied you are overall with the following aspects of the library.



FINDINGS:

- Respondents are most satisfied with the library's customer service (4.61), the atmosphere in the library (4.46), and the library facilities (4.43).
- Respondents are least satisfied with the library's website (3.99) and how well their culture and interests are represented in the library's events (3.85).
- Most items received a rating of 4 or higher indicating respondents were "Satisfied" with most items.

For any items that you clicked dissatisfied or very dissatisfied, what can the library do to increase your satisfaction?

Multiple respondents shared the following suggestions:

- **Events:** More diversity and representation in events; more events highlighting African American interests outside of February; more events highlighting African American interests outside of February; more events for teens and young adults; more adult events
- **Collections:** More new books; updated collection overall; more diversity in collections; more copies of popular items; more e-book availability; more and updated nonfiction, in general; more Spanish titles; a Library of Things
- **Services and Technology:** the website is clunky/confusing/hard to navigate; website is too slow; technology is outdated; need a better catalog search function
- **Facilities and Spaces:** Make better use of the entry way space and the desk there; more study and meeting spaces; allow reserve-ahead study spaces; update facility overall; create a makerspace

Respondents shared additional suggestions related to **events:**

- *In general:* The ability to register for programs more easily, e.g., registration via app; more openings at events or more times; participant input on book club selections; go back to staff moderators for book discussions
- *Specific topics/themes:* Art/crafting/making; bring back Chapters for Charity event; more German events; events highlighting female artists; more historical presentations; more current industry and technology lectures; more conservative programs; more Jewish events; programs on climate and political discourse; one-day workshops, e.g., how-to-use tech; programs on American history from perspectives of indigenous and non-native immigrant populations
- *Specific timing/scheduling:* More preschool events in the summer; more events beyond 9 to 5 hours; start music evenings at 6PM instead of 7PM; evening or weekend book clubs
- *Specific audiences:* More after-school events for tweens; events for mothers of different age children; couples book club or data night activity; offer more for men; more creative and collaborative events for kids with the community; more LGBTQ events; more interesting summer programs for children

Respondents shared additional suggestions related to **collections:**

- *In general:* More audio streaming titles; too many pre-2010 books; more current editions; more availability of new authors; reader's advisory, e.g., help finding more fiction I would enjoy
- *Specific to languages and cultures:* Romanian, Spanish, French, Italian, Arabic, Islamic texts, German, Hebrew, more Jewish holidays represented
- *Specific to children/teens:* Books for children with dyslexia that are leveled, e.g., Orton Gillingham method; more and newer nonfiction for youth at several levels and more than one book on a topic; books about Asian Indian culture for kids; bilingual Italian books for kids; more children's e-books; more YA titles
- *Specific to access:* Promote instruction/information on how to use MelCAT; turn on patron recommendation in Libby; liked Overdrive better than Libby or Hoopla; Metro Net audio selection is limited compared to Download Destination
- *Specific collection requests:* Books by Black YA author, Earl Swell; materials that represent earth-based spiritualities, e.g., solstices, equinoxes; more current editions; more Christian and

Catholic materials, e.g., Bishop Barron's Word on Fire, and Father Timothy Gallagher; more Sci-Fi, digital and physical; more non-political nonfiction; improve mystery collection; gaps in fiction series (physical and digital); increase board game collection; Ditto magazine for kids; more Jewish authors; more conservative books; more older movies on DVD or streaming; more books by foreign authors; more Christian character-building books

Respondents shared additional suggestions related to **services and technology**:

- *Would like access to:* Adobe products; LinkedIn Learning; Ancestry access off-site
- *Could use more help with:* Hoopla; tech questions at the reference desk; virtual renewal of library card
- *Specific to website:* Website security certificate is invalid so I cannot access the site through my company's firewall; mobile website difficult to navigate; need an app; hard to find online magazine access; events section of mobile site is hard to use; events calendar not user-friendly
- *Specific to hardware:* Make sure Chromebook access is always working; need new monitors and scanners; more options for digitizing old media; keyboards on the computers are dirty; clean up wires in foot space in study room
- *Specific to catalog:* New catalog doesn't show when books are due

Respondents shared additional suggestions related to **facilities/spaces**:

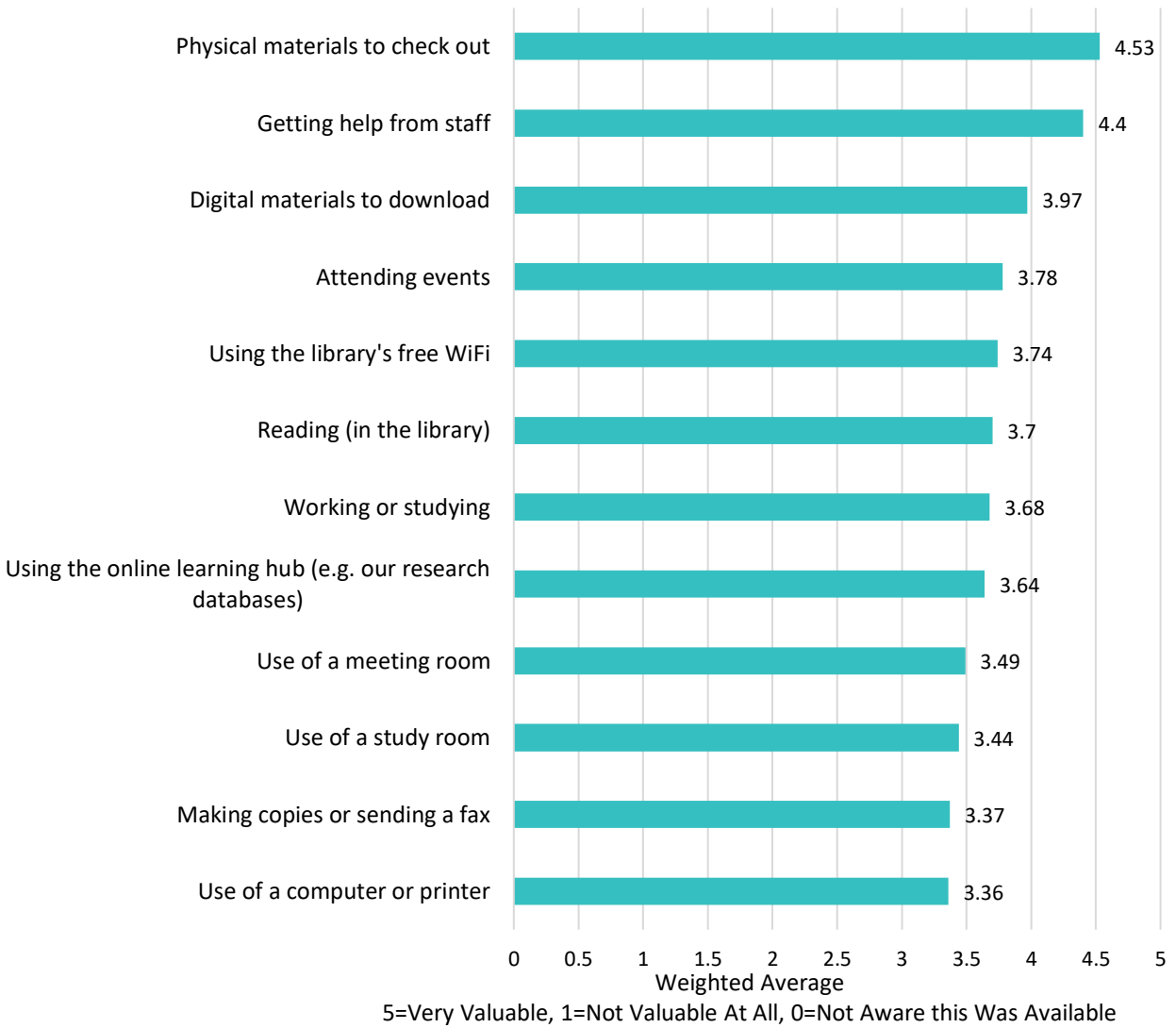
- *Specific to overall spaces:* Reconfigure building into more defined spaces; better wayfinding signage; bigger Farmington facilities; overall too loud, e.g., HVAC and staff; cold drafts in main area; patio with outdoor seating; more quiet areas; fresh paint; better lighting; better parking; update the elevator; highlight more conservative individuals on children's wall; update all task lighting and outlets; add USB port at tables; more windows and light in children's area at main library; larger and more welcoming teen space downtown; update children's area
- *Specific to furniture:* Need comfier furniture; furniture is old and dirty
- *Specific to safety:* Recarpet or apply visible and non-slip surface to steps on south side that lead to adult nonfiction (difficult to see steps for those with vision impairment);
- *Specific to cleanliness:* Library could be cleaner; children's area could be cleaner; tables/surfaces are dirty

Respondents shared **other suggestions and comments**:

- Enforce no food eaten in library; enforce no talking on cell phones; enforce tutoring in study rooms only; too liberal; represent all cultures more; would like to see more food vending options; more diverse staff that represents service area population; require masks at events; increase access to Christian topics and more conservative ideas; more awareness of the growing Filipino American community; easier access to information about joining the Friends of the Library; would appreciate patience from staff
 - "Would love to see Black authors and program runners."
 - "With all of the millages we have been voting on and passing through to support and enhance this library, it falls short on technology."
 - "Keep up the good work on the technology. We appreciate it."
 - "You are not qualified on 'culture.' Knowledge is the library proper focus."
 - "The online trivia was always fun, if they could bring that back."

- “The library is conspicuous in its support of exclusively liberal causes, books, and celebrations.”
- “I notice the library plays it “safe” with certain titles.”
- “Would love to see a "drag queen reads to kids" event or maybe partnering with Spectrum Center in Ann Arbor to do an event for LGBTQ+ youth in FH.”
- “I do know that FH has a pretty significant Indian population, so I think it's important they feel welcome and have materials/events for them. Like maybe the library could do something for Diwali?”
- “We love when the local musicians who appeal to young women perform.”
- “Recognize and Celebrate Muslim Eid (post Ramadan and Eid Al-Adha) invite American Muslim authors, especially for children.”
- “Overall, the experience is not very professional.”
- “Even if they don’t have the book, they help me find it!”
- “There is a vast collection of progressive texts, but any time I search for a particular book that has a conservative slant, it is not part of the library's collection.”

Please rate the following library services, collections, programs, and spaces in terms of their value to you and your family.



FINDINGS:

- Respondents most highly value checking out physical materials (4.53) and getting help from library staff (4.4).
- Digital materials (3.97), attending events (3.78), and using the library's free Wi-Fi (3.74) all rated close to "Valuable" (4).
- Of least value to respondents were making copies and sending a fax (3.37) and using a computer or printer (3.36). However, these items still rated above "Neutral" (3).

What do you value most about the library's spaces and the experiences you've had in the library?

Multiple respondents noted they find value in:

- **Events:** Children's programming; variety of age-based story times, including baby and toddler
- **Spaces and experiences for children and families:** Children's play area; kids' area is welcoming (both branches); selection of materials available for children, teens, and young adults; dedicated space for kids
- **Access to resources and materials:** Variety and availability of books and materials; new book shelf selection; ease of access to digital materials; Hoopla; Libby; ease of ILL requests and holds shelf/pick-up; Large Print books; newspapers; online databases and digital publications, e.g., Consumer Reports; DVDs; magazines; audiobooks; classics in the collection; Books to Go section; hotspot check-out
- **Facilities:** The range of spaces for a variety of ages and purposes; variety of small/large spaces and quiet/group rooms; meeting rooms; private desk areas for working; art displays; clean building; comfortable building; fireplace in cold winter months; plenty of natural light; good lighting inside and outside; available power during outages
- **Services and Technology:** Printing; computers; free wi-fi; copy room; fax; book sales
- **Atmosphere/environment:** Welcoming/inviting and quiet atmosphere; productive atmosphere great for studying; peaceful; calm; sense of community/connection to community; pleasant; relaxing
- **Staff:** Helpful staff; excellent customer service; welcoming; knowledgeable; friendly

Respondents noted further value in **library events:**

- Events are "top-notch"; nature/animal programs; ESL classes; conversation club; MLK activities; variety of events offered; local authors; activities that share and celebrate diversity; book clubs; trivia; Harry Potter events; musical performances; guest speakers; genealogy workshop; baby and toddler storytimes; film shorts; Battle of the Books; Star Wars Halloween party; Hooked on Books; poetry and memoir groups; aging/Medicare programs

Respondents noted further value in **spaces and experiences for children and families:**

- Children's department is "world class;" learning materials and toy areas are clean and well-cared for; welcoming to students after school; very hospitable to children; parenting books near children's play area; storytime space at 12 Mile; book displays in children's area; collection helps with homeschooling; great toys and kits for very young kids; variety of children's media; Teen Advisory Board; children's tree house; reading with a stuffed animal

Respondents noted further value in **access to resources and materials:**

- *Specific to access and selection:* information and books meet a lot of my needs; books I need for research; auto-renewal service
- *Specific collections and resources:* movies and video games; genealogy services; Lucky Day books; special collection items (games/puzzles); foreign language collections; history and biography collections; fiction collection; two-day rentals; no late fees; Mango languages; graphic novels; access to tax forms; access to brochures on community events

Respondents noted further value in **library facilities:**

- Convenient set-up and check-out; lots of open space; new 'cafeteria' space; 2nd floor room has comfortable seating and good microphone; wide desks; auditorium; décor; the new front door;

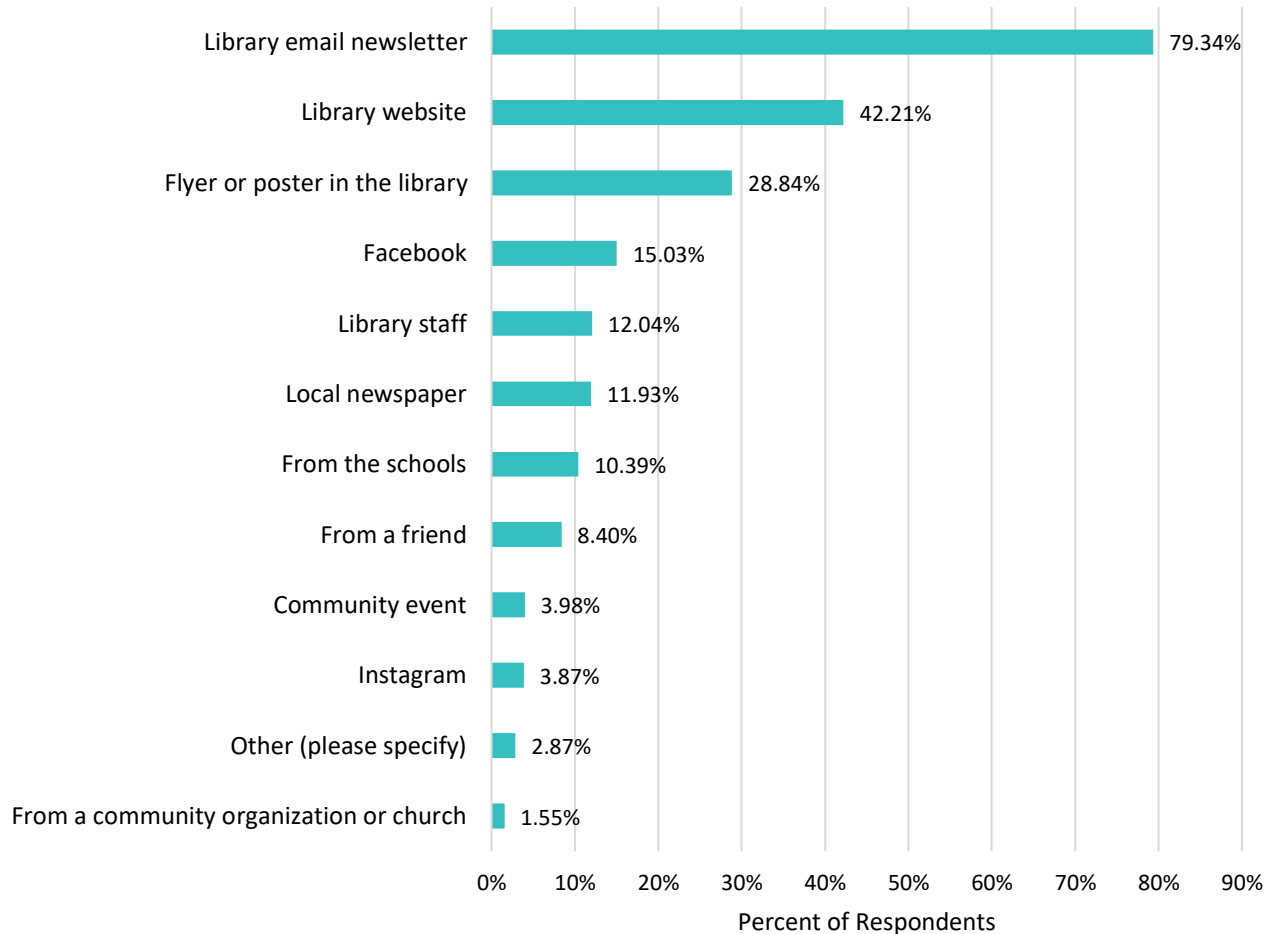
computer lab space is “ideal;” overall accessibility; size and coziness of the downtown branch; the smell of books/the library; changing exhibit areas
<p>Respondents noted further value in library services and technology:</p> <ul style="list-style-type: none"> • The automated book return; scan and email feature on the copier; 3D printer; hot beverages; scrap paper; vending machine accessibility; accessibility of the kitchen and tech services for auditorium use; technology for transferring slides to a thumb drive; video conversion technology
<p>Respondents noted further value in the library’s atmosphere/environment:</p> <ul style="list-style-type: none"> • Motivating to young people; friendly feeling; safe; family-friendly; private
<p>Respondents noted further value in the library staff:</p> <ul style="list-style-type: none"> • Staff expertise; availability; research help; staff remembers my family and tailors experience; staff recommendations; staff interactions; go above and beyond; very approachable; passionate; welcoming to all groups; loved the little videos the staff made during COVID; pleasant
<p>Respondents value other spaces and experiences:</p> <ul style="list-style-type: none"> • The ability to rent the 12 Mile auditorium at a reasonable price for local nonprofits; weekend and evening hours; new fiction section of the FCL newsletter for discovering new books; the overall physical presence of the library in the community; getting emails about events and requested books

Additional suggestions and comments regarding library spaces and experiences:
<ul style="list-style-type: none"> • Respondents would like more: fun adult programs; cultural celebrations; digital book selections; online speaker events; private reading areas; adult sized tables in children’s areas; events for grades 5 to 12; study rooms; new books; educational toys out and access to the large play area; space in the teen area
<ul style="list-style-type: none"> • “The libraries are both very nice facilities - perhaps food and drink should not be allowed to keep them that way.” • “It would be AMAZING if there was seating/mini greenhouses (like people used for dining during COVID) OUTSIDE of the library so people who don't have/can't afford Wi-Fi could comfortably use the library Wi-Fi during days/times the library is closed. When I experienced difficult financial times, I sat in my car outside of the library to use the Wi-Fi for live, online job training.” • “We need a larger venue space on Liberty Street. The events are so popular the walls are bursting.” • “...since Covid I feel the staff has turned more fearful and nannyish.” • “Too bad that the coffee is gone.”

Many respondents had positive comments about the helpful, friendly, and resourceful staff; the easy access to materials; the quiet, comfortable buildings with a variety of spaces; and programs and events:

- “What I like most about the library is the people at the information desk. They are extremely knowledgeable and helpful.”
- “Able to access most collections and have available reading space for when I do come to a facility in my wheelchair.”
- “I appreciate the help from the staff very much. They usually are able to answer my questions, get me what I want and they're always really nice.”
- “Always clean & a pleasant atmosphere. Staff has always been very helpful & courteous.”
- “Taking my kids to the library is so important to me and sometimes they make noise when playing. No one has ever said anything and I appreciate that so much and my kids find so much joy in going to the library.”
- “Deeply appreciate the library’s willingness to honor my requests for new purchases of novels when available.”
- “Your librarians are experts and provide services to all ages. The library personnel is culturally competent. This is a welcoming community where censorship is avoided, as it should be.”
- “The community our family has created with the librarians in the Children’s department are life-changing. My son has special needs and the library was the first safe space during the pandemic we could go and work on skills. Even when out and about throughout Farmington they say hi to him by name and are friendly and knowledgeable!”
- “The librarians are absolutely wonderful and deserve recognition for their dedication to the children’s programs.”
- “Very diverse and accepting of all cultures and ethnicities.”
- “Downtown library is easy to get to and use.”
- “They have and continue to be an important learning, meeting and gathering space for my family.”
- “The sense of learning and knowledge - unfettered by partisan, religious or cultural bias – that pervades its services and collections -- no censorship of materials.”

Where do you learn about what is going on at the library?



FINDINGS:

- The majority of respondents (79.34%) learn about what is going on at the library from the library’s email newsletter.
- The library’s website (42.21%) and flyers/posters in the library (28.84%) are other popular ways of learning about what is going on at the library.
- Less than 10% of respondents learn about the library from a friend (8.4%), from a community event (3.98%), on Instagram (3.87%), or from a community organization or church (1.55%).
- “Other” responses not listed above are summarized below:
 - Flyers and info at the Wednesday/Thursday toddler groups;
 - Farmington emails;
 - Family;
 - MCMR;
 - Mail;
 - fhgov.com

Where are other places that you get news about the Farmington/Farmington Hills communities?

Local papers and online news media:

- The Farmington Press, the Observer, Patch.com, the KickstART Farmington newsletter, and Oakland Press were all noted as news sources.

From the City:

- Several respondents noted city emails and the city website as points of information. Flyers with the water bill and the Activity Guide were also noted as sources of information. The Hawk and Costick Center were listed, as were downtown posters/flyers and the city hall digital sign.

- **From the Schools:**

FPS emails and schools such as Forest Elementary and East Middle School were noted as sources of information.

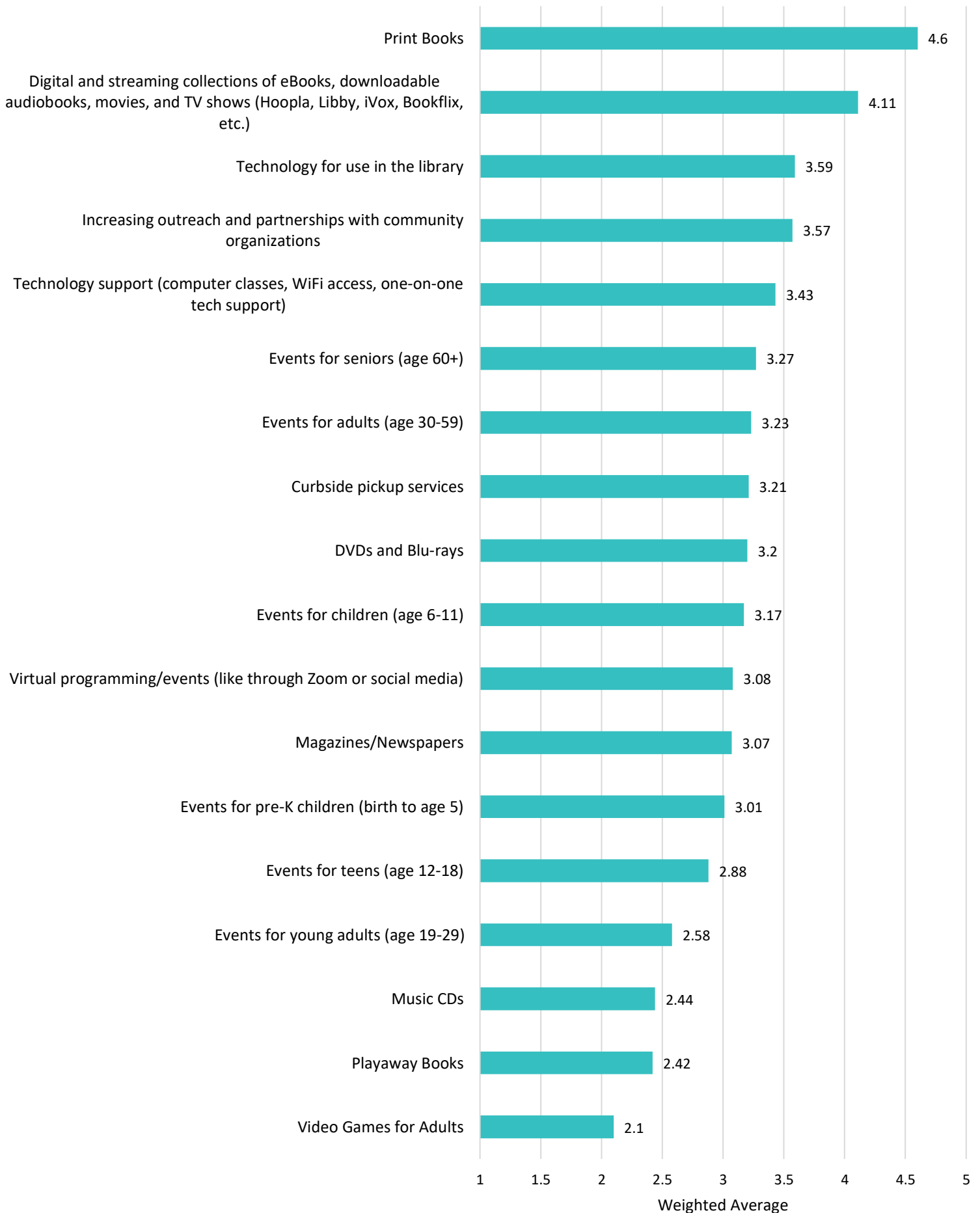
Social media:

- Facebook was mentioned most as a social media source of community news, including the Farmington Facebook page. Instagram and the Nextdoor app were also mentioned.

Word-of-mouth:

- Many respondents listed “neighbors” and “friends.” They also noted they learn about community news at the farmer’s market, at the barber shop, and from groups such as Oakland County Moms and Adults 50 & Better.

We are thinking about where to focus our resources over the next several years. As you think about your next 4 years, please rate the items below based on your level of interest.



FINDINGS:

- Respondents are most interested in print books (4.6) and digital/streaming collections (4.11).
- Respondents are least interested in music CDs (2.44), playaway books (2.42), and video games for adults (2.1)
- In respect to programming/events, respondents are most interested in events for seniors (3.27) and adults age 30 to 59 (3.23).

Other interests and suggestions for library resources over the next 4 years:

Respondents shared interests in **events**:

- Play and engagement for kids 4+ and 11+; mental health forums; language learning, e.g., ESL; US cultures classes; US life tips/adulting resources (for immigrants); Adobe classes; lectures/talks from current authors; Chapters for Charity; adult literacy classes; more cultural events; local adventuring event with hashtag to promote; painting classes; essay writing contest; continue Zoom activities; book discussions

Respondents shared interests in **collections and resources**:

- Access to Adobe suite; LinkedIn Learning; Library of Things with tools, pans, art supplies etc.; more tactile books for babies and toddlers; free access to publications that typically have a paywall; more titles in Hoopla; journal access; seed bank; more holiday resources; video game system rental; larger audiobook selection; music box sets; Kindle support; 4K/UHD Blu-rays; books on CD; more hotspots and increase loan period for vacations; continued access to history archives

Respondents shared interests in **services and technology**:

- A makerspace with tools and machines for creating; upgraded touchscreens in children’s area; online instruction on library technology

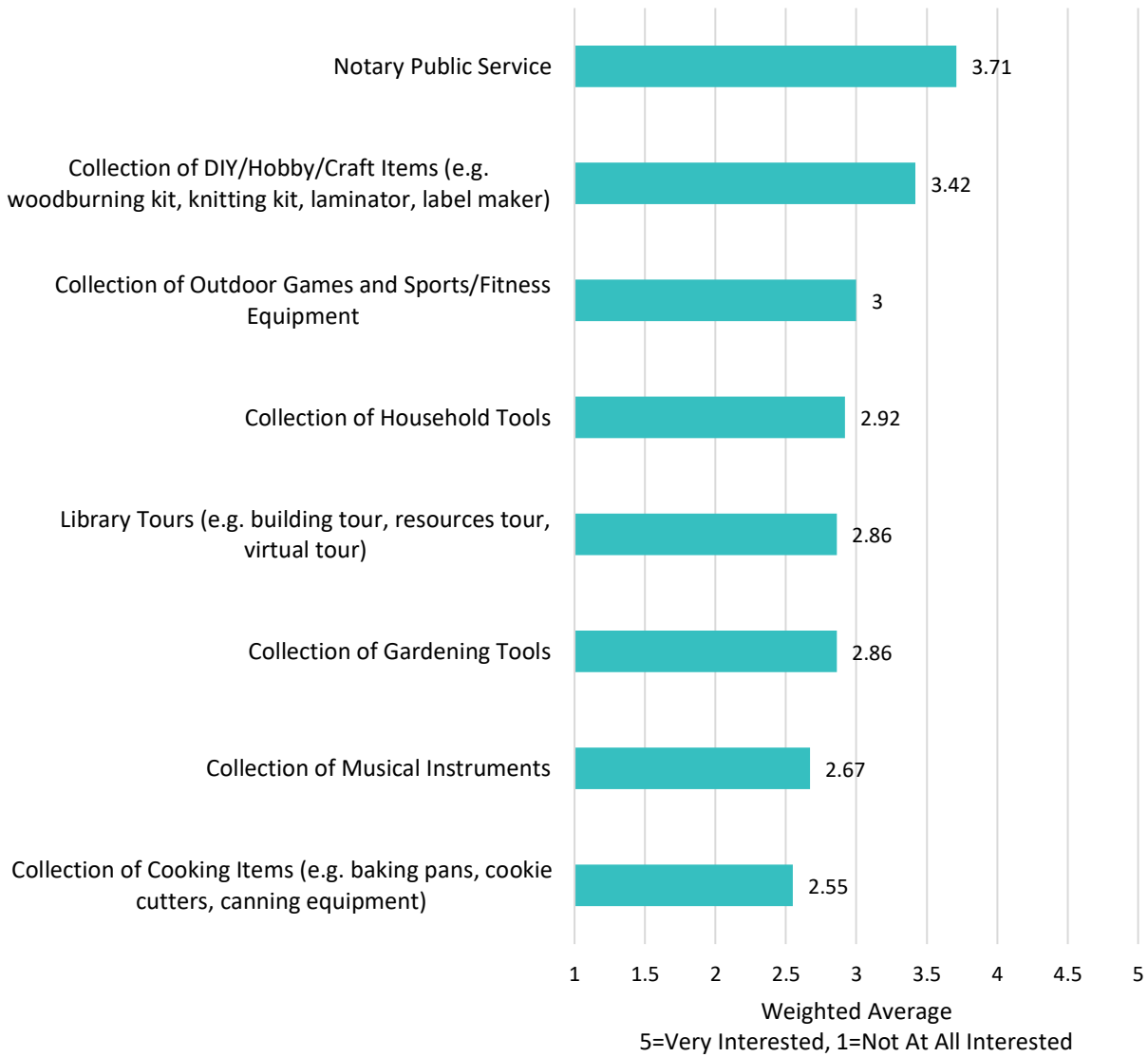
Respondents shared interest in **facilities/spaces**:

- Outdoor patio; bring back the café; convert green space to native meadow; drive-up materials return

Respondents shared **other interests**:

- More resources/new facility for underserved populations; Michigan Adventure Pass

Please rate your interest in the following potential new library collections and services.



FINDINGS:

- Respondents were most interested in a Notary Public service (3.71) and a Collection of DIY/Hobby/Craft Items (3.42), however these ratings were each under the rating of 4 (Interested).
- Respondents were least interested in a Collection of Musical Instruments (2.67) and a Collection of Cooking Items (2.55).

Other potential new library collections and services:

Respondents shared suggestions related to **collections**:

- Office/educational tools like a laminator, ring binder, Cricut; SAD lights for winter; board/card games; circulating artwork; telescopes and microscopes; photography tools; art tools; sports equipment kits; eco tools, e.g., voltage meters, thermal cameras; seeds; sewing machine; larger musical instruments that are expensive to buy, e.g., cello; puzzles; Legos; a zine collection; bagged/boxed educational items for families/kids; tools; big books for teachers

Respondents shared suggestions related to **services**:

- Delivery and pick-up service for homebound patrons; free tax prep/advice service; rental of library rooms for parties; college application help; test prep; genealogy research help; technology lab with media transfer capabilities; provide feminine hygiene kits; digitize high school yearbooks and offer online; lockers for after-hours holds pick-up

Respondents shared **other suggestions**:

- A 'learn to use the library' class; workshops to learn to use the tools and hobby supplies; personal technology lessons, e.g., iPhone; more events; tours helpful if they're short or small; cooking demonstrations; tutoring; language courses; swag store with library totes, t-shirts, etc.;
- A few respondents noted they might have items to donate that could be used in collections, e.g., soap making tools, piano.

Some respondents shared **comments and concerns about the idea of expanding collections and services**:

- "It's a library, not a kitchen or a tool shed. The focus needs to be on books."
- "Fix the book collection and the website before adding more services."
- "Only interested in these services if they do not take away from hard copy and online books and other literacy services."
- "My concern with many of the collections mentioned above is that they would not be taken care of/cleaned, and then whose responsibility does it become to make the item shareable again?"
- "I would be hesitant to check out cooking or baking supplies unless I knew that the library sterilized them."
- "I think my bank and City Hall both offer notary services already."
- "THIS LIST IS AMAZING. WOW! I would never have thought of some of these - but like, I've always wanted to try woodburning or a new instrument. If the library had a check-out option for something like that, I would be so geeked!!!"
- "Not an area the library should pursue. Maintenance, hygiene, cleaning of tools and equipment would be a nightmare and not the realm of library personnel. Not to mention the cost of goods and expected losses of unreturned materials!"
- "Ann Arbor has an interesting collection for musical equipment such as guitar pedals, amps, microphones, etc."

What spaces in your community make you feel the most welcome? What is it about this space that you find welcoming?

Community/Public spaces:

- The library; Heritage Park: nature walks, covered shelter areas; churches; children’s library areas; local parks and other green spaces; The Hawk: classrooms here; farmers market; Farmington pavilion downtown; Costick Center; the Heritage Room; water spaces with a pond or fountain; tee ball games; dog park; schools; nature center; neighborhood

Dining, Retail, and Entertainment spaces:

- Specialty shops; coffee shops; restaurants; theatres; Longacre House; Kickstart Gallery; Panera; Cheese Lady; YMCA; Clothes Encounters; Farmington Brewing Co.; Fresh Thyme

Physical, environmental, and atmospheric attributes to welcoming spaces:

- *Respondents feel welcome in spaces that have:* comfortable seating; disability accessibility; updated, easily-accessed restrooms; access to water, coffee, and snacks; a variety of spaces for small group use; indoor/outdoor seating options; a neutral odor; good lighting; low/calm music; have good use of signage; fast internet; space to be alone; privacy to wander and browse; outdoor views; fresh air; copier and computer accessibility; good equipment; activities for all ages; accessible parking; natural surroundings.
- *Respondents feel welcome in spaces that are:* quiet; calm; comfortable; light-filled; open; clean; clutter-free; well-maintained; free; fun for kids; walkable.

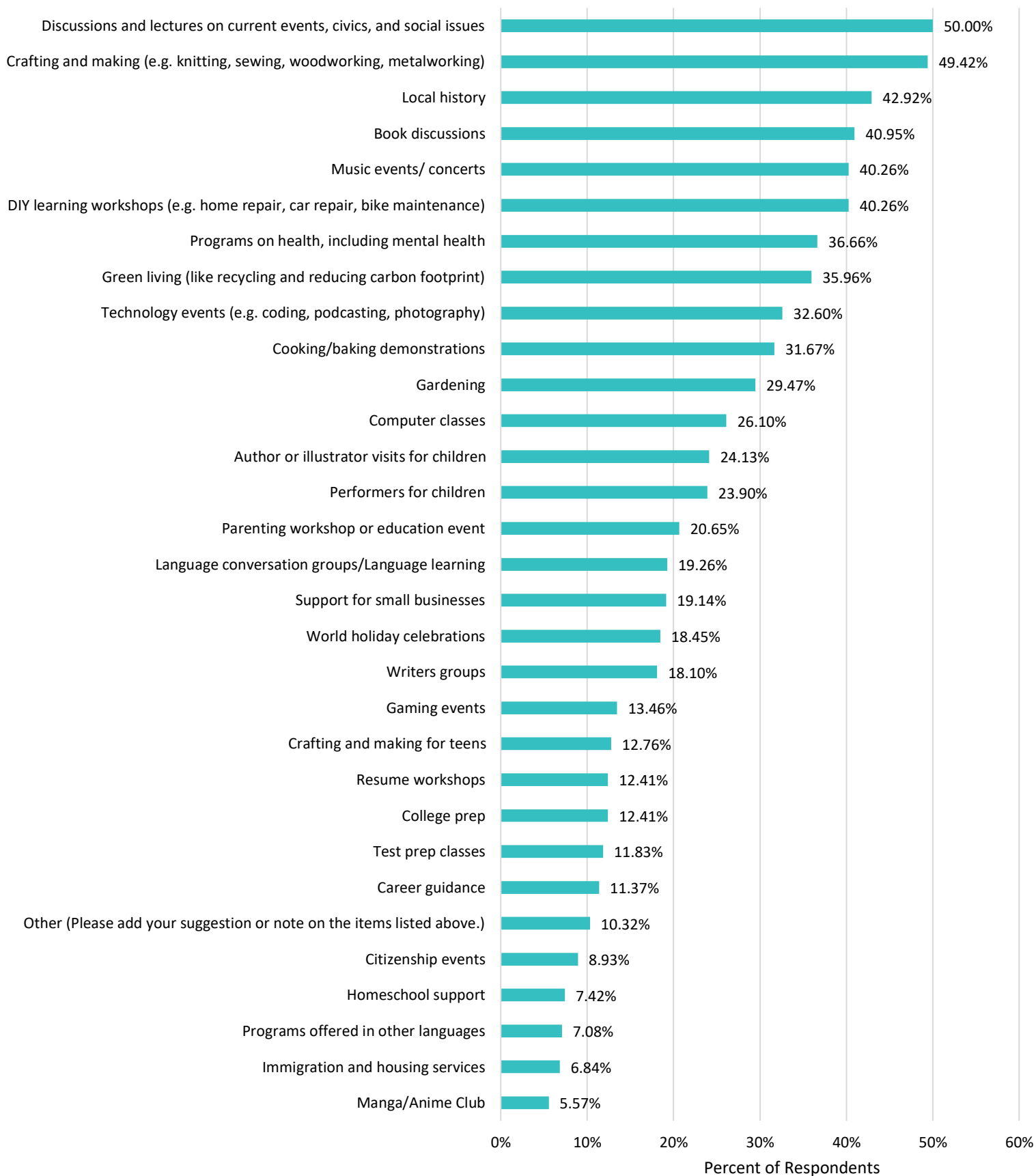
Human attributes to welcoming spaces:

- *Respondents feel welcome in spaces where:* they are known by name; they are greeted; there are friendly and welcoming staff; there are caring and helpful people; young families are encouraged to be there; learning and self-improvement are encouraged without bias and inequity; they feel safe from physical and cultural harm; there is strong multi-cultural representation; they can share with other artists; there is no sales pressure; there are visibly diverse and inclusive spaces, e.g., rainbow flags and Black Lives Matter signs; people don’t judge them; they see others who look like them; recycling is promoted; there are explicitly LGBTQ+ friendly spaces.

Other comments about what spaces people find welcome and why:

- “Any place that acknowledges and celebrates the diversity of people’s differing cultures, needs, and ability;”
- “Library is #1, no other city spaces are as welcoming as FCL!”;
- “The people are often what makes a space welcoming.”
- “Not being required to ‘mask’ any longer than the minimum necessary.”
- “The layout in both libraries is very confusing to navigate. I almost always need a librarian to direct me to the right locations.”
- “The librarians! Real people: who smile at you and remember you!”
- “I’m used to visiting plazas in Europe and I feel very welcome in these spaces, but in our area, sadly these spaces don’t exist.”
- “Honestly, I don’t feel overly welcome in the library. I bring my children occasionally, and they are beat over the head with "diversity" books. Everything on display is an attempt to showcase how progressive the library is trying to be, and that’s not interesting or welcoming to me.”

Considering future events for library patrons, what topics of programming would you attend at the library? (Check all that apply.)



FINDINGS:

- Respondents were most interested in future events featuring discussions and lectures on current events, civics and social issues (50%) and crafting/making (49.42%).
- Several respondents also indicated interest in local history events (42.9%), book discussions (40.95%), DIY workshops (40.26%), and music events/concerts (40.26%).
- Fewer respondents were interested in citizenship events (8.93%), program in other languages (7.08%), immigration and housing services (6.84%), and manga/anime club (5.57%).

Other program/event suggestions provided by respondents:

Events for children/youth/families:

- Babysitting classes; programs with animals; Boy Scout merit badge classes; Scout nights; parenting workshops; special needs inclusive storytimes; events for older teens, e.g., separate 12-year-olds from 16-18-year-olds); themed days, e.g., dinosaur day, ocean day; LEGO events; mental health workshops; ongoing preschool club

Skills building, how-to, and DIY events:

- One-on-one tech device instruction on iPad and cell phone; beekeeping; web design; speech writing/giving; videography; resume workshop; career coaching; computer repair; open crafting/art for all ages; specialized software, e.g., Photoshop; college application workshops; how to use a 3D printer; how-to use Google Drive, Outlook, Mac; art workshops

Literacy and learning events:

- Author and illustrator events; civic activation/learning; genealogy; writing groups; civil engineering study; financial literacy; history programs; senior-specific programs, e.g., Medicare; travel/geography lectures; book discussions; storytelling events

Cultural, entertainment, gaming events:

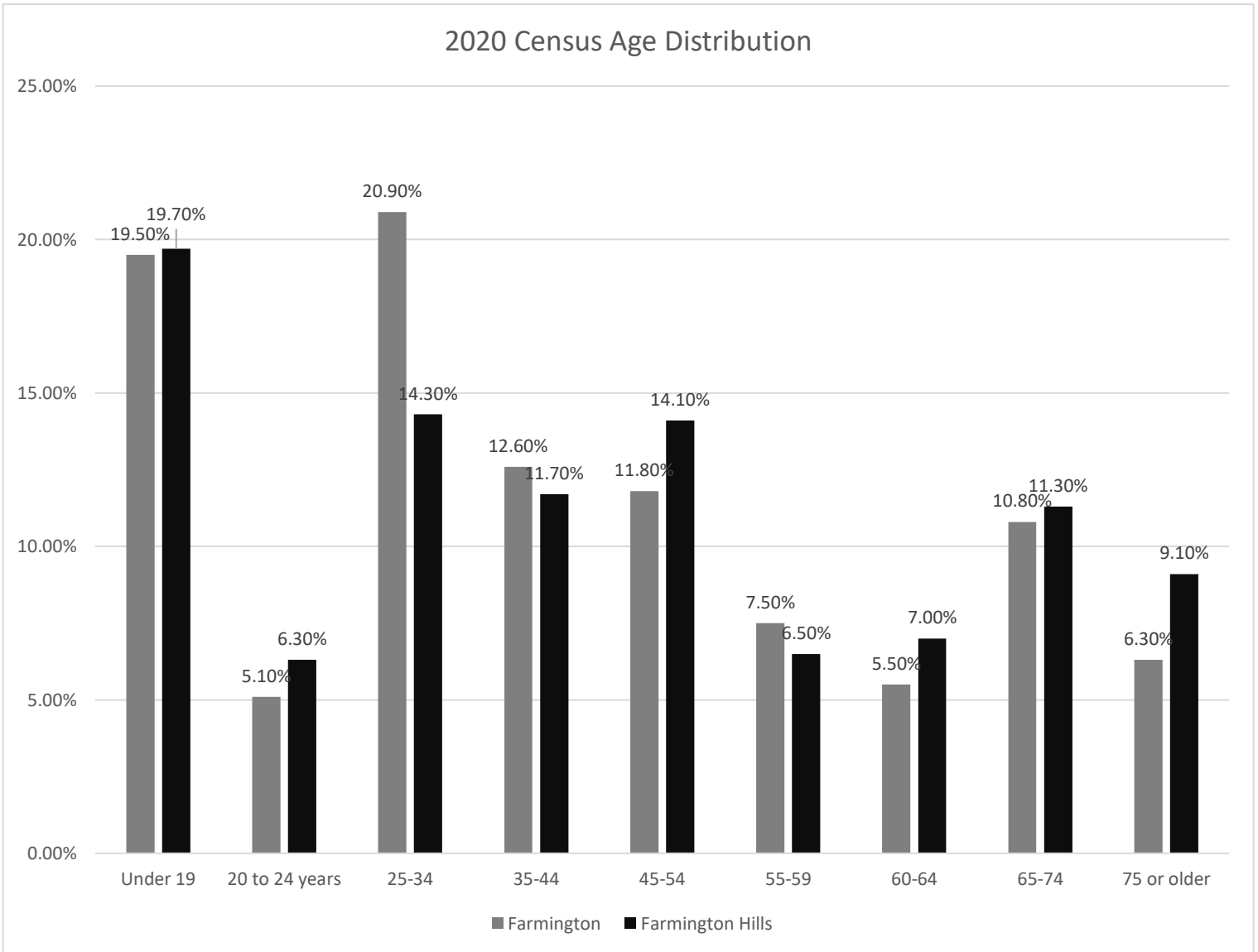
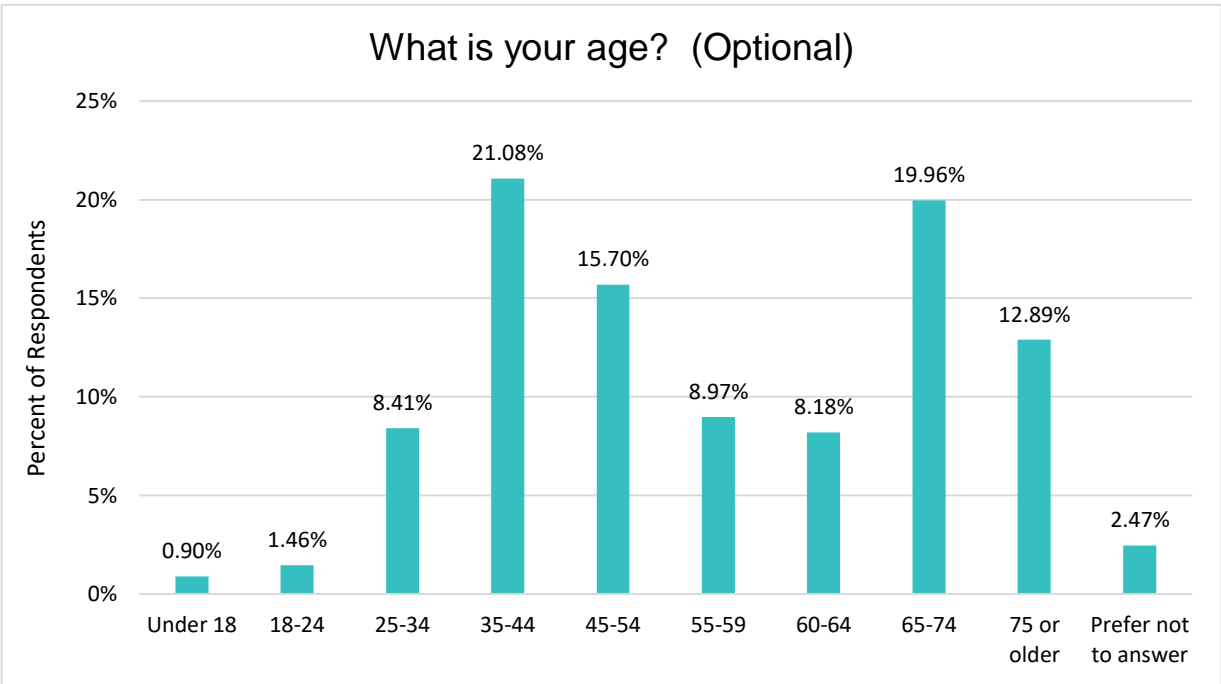
- Trivia events; food truck day downtown; board games and puzzles; movies and discussions; backgammon; chess; cards; more Japanese content; theatre groups; foreign film viewings; Italian discussion group

Other:

- Prefer virtual/recorded for later viewing; share events with other libraries; more indoor/rainy day activities; discussions that represent both sides and encourage freedom of discourse; respectful political debate; host candidates for public office

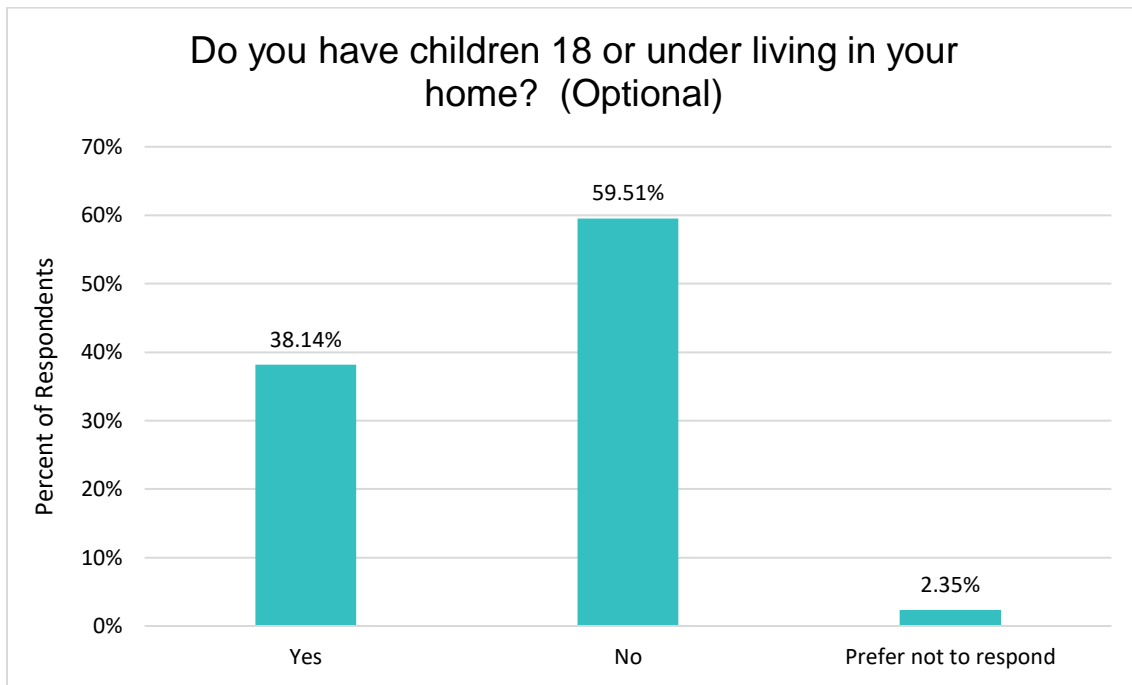
Are there any needs that you believe are being unmet in the Farmington/Farmington Hills community? How could the library help address these needs?

<p>Respondents shared suggestions related to programs:</p> <ul style="list-style-type: none"> • Outdoor concerts; more programs for adults (ages 18-49); hobby sharing group; events pairing seniors and youth; book clubs for 35-55; book clubs for 55+; program like 1000 books before kindergarten but for ages 6+; more events for people with disabilities; book discussions on racial justice/integration; more multi-cultural events; tutoring; various educational programs; library nights at FPS locations; creative writing workshop; homebuyer and DIY home programs; media literacy learning; language learning/conversation tables; host events for new residents to meet each other; passport events and photo help; groups and support for new moms; be aware of timing for events for small children, e.g., avoid naptime; more homeschool events; more events overall (large crowds now)
<p>Respondents shared suggestions related to collections:</p> <ul style="list-style-type: none"> • More user-friendly online access to materials and better instructions for access; join The Library Network; more Christian books for all ages; more foreign/translated fiction in digital collections; loanable tech, e.g., laptops; more books in Spanish; ability to renew an item online when it has no holds; larger/better e-book selection; expand magazine selection; lending library of tools; more copies of new books; more African American authors; Library of Things; larger collections overall; more research databases, e.g., JSTOR; expand digital checkout limits
<p>Respondents shared suggestions related to services:</p> <ul style="list-style-type: none"> • Travel or tour group; access to Adobe products; LinkedIn Learning; continue services to homebound patrons; tech support for seniors; support accessing social services; bookmobile/mobile library; incorporate more volunteers and community service from groups like Scouts; information on affordable housing; food drives year-round; improve the used book sale to make more money; free tax forms; list of all local activities for children/families; better communicate what is available at the library via the website
<p>Respondents shared suggestions related to facilities/spaces:</p> <ul style="list-style-type: none"> • Conference room rental should be free; drive-up window; a lot of under-used space in the main library; easier access around shelving for those using walkers/wheelchairs; better accessibility in children’s department bathroom; clean surfaces more often; an aquarium in the children’s area; broaden the activity room at Liberty Street location; keep all toy bins out; physical appearance improvement, e.g., put away snow shovels in summer; bring back the coffee shop
<p>Respondents share other community needs, suggestions, and comments:</p> <ul style="list-style-type: none"> • More walking paths; addressing wealth gaps in suburbs by increasing resources; diverse staffing that represents population; need better public transit, walkability, and bike-ability; concern about sexual content in children’s books; more collaboration with schools and villages; defend and protect free speech to secure the future of the library; don’t try to compete with streaming services, be here “in person;” consider diversity and inclusion; community-at-large has poor internet provider choices; need more places for locals to hang out; partner with local schools to enhance foreign language competencies; remain politically neutral; “Stop woke messaging in the front displays;” “So much adult bullying in this community”



FINDINGS:

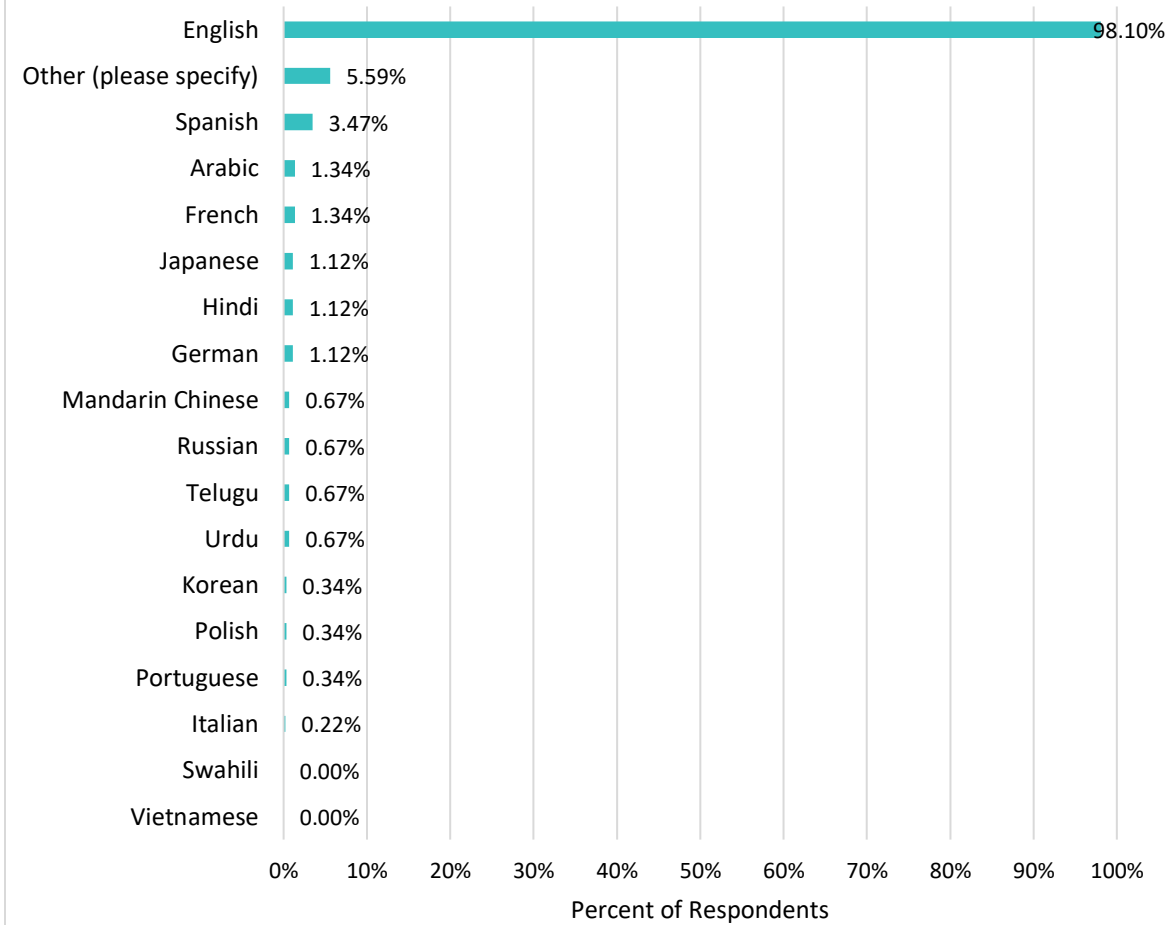
- The largest group of survey respondents by age was ages 35-44 (21.08%), followed by ages 65-74 (19.96%).
- 50% of respondents were age 55 and over. In 2020, 30.1% of Farmington residents and 33.9% of Farmington Hills residents were age 55 and over.
- Only 2.36% of respondents were under age 25. In 2020, 24.6% of the population of Farmington and 26% of Farmington Hills was under age 25.



FINDING:

- The majority of respondents (59.51%) do not have children 18 or under living in their home.

What languages are spoken in your home? Please check all that apply. (Optional)



FINDINGS

- The majority of respondents (98.1%) reported speaking English at home.
- 3.47% of respondents reported speaking Spanish at home.
- 5.59% of respondents reported speaking other languages not listed in the survey. Those languages are noted below.

Other languages spoken by respondents at home:

- Hebrew
- Gujrati
- ASL
- Turkish Farsi
- Macedonian
- Chaldean
- Tamil
- Igbo
- Armenian
- Yiddish
- Romanian
- Anishinaabemowin
- Nepali
- Latvian
- Na
- Malayalam
- Thai
- Greek
- Farsi
- Cantonese
- Punjabi

OVERALL
FINDINGS

- The majority of survey respondents (88.94%) were very satisfied or satisfied with Farmington Community Library overall.
- Respondents were most satisfied with the library’s customer service, atmosphere, and facilities and find the most value in checking out physical materials and getting help from staff.
- When asked what would make the library easier to use and increase satisfaction, many respondents indicated, among other things, a desire for more diversity in collections and events, larger/broader selection of e-books, better navigability of the website, longer hours, and more study and meeting room spaces that can be reserved.
- Respondents find the atmosphere in the library to be very welcoming and the staff to be helpful and knowledgeable. They also find great value in the children’s programming, play areas, and collections.
- Respondents shared many suggestions about future programming topics as well as ideas about scheduling and tailoring programs for specific audiences.
- Free wi-fi, computers, printing, and copying were all noted as helpful services. Respondents would like access to updated technology, more help using tech services and devices, and an easier-to-search catalog.
- While respondents find the facilities comfortable, they shared many suggestions for updates to the buildings and furnishings.
- Most respondents learn about library news from the library’s email newsletter (79.34%).
- Respondents reported feeling welcome in spaces where they are greeted and known by name as well as places that are outwardly diverse and inclusive and have ample amenities such as food and drink, updated bathrooms, and internet access.
- While some respondents indicated interest in a future notary service and new collections of DIY/hobby/craft items, other respondents suggested different services and collections and voiced concerns about the library adding new services and collections.

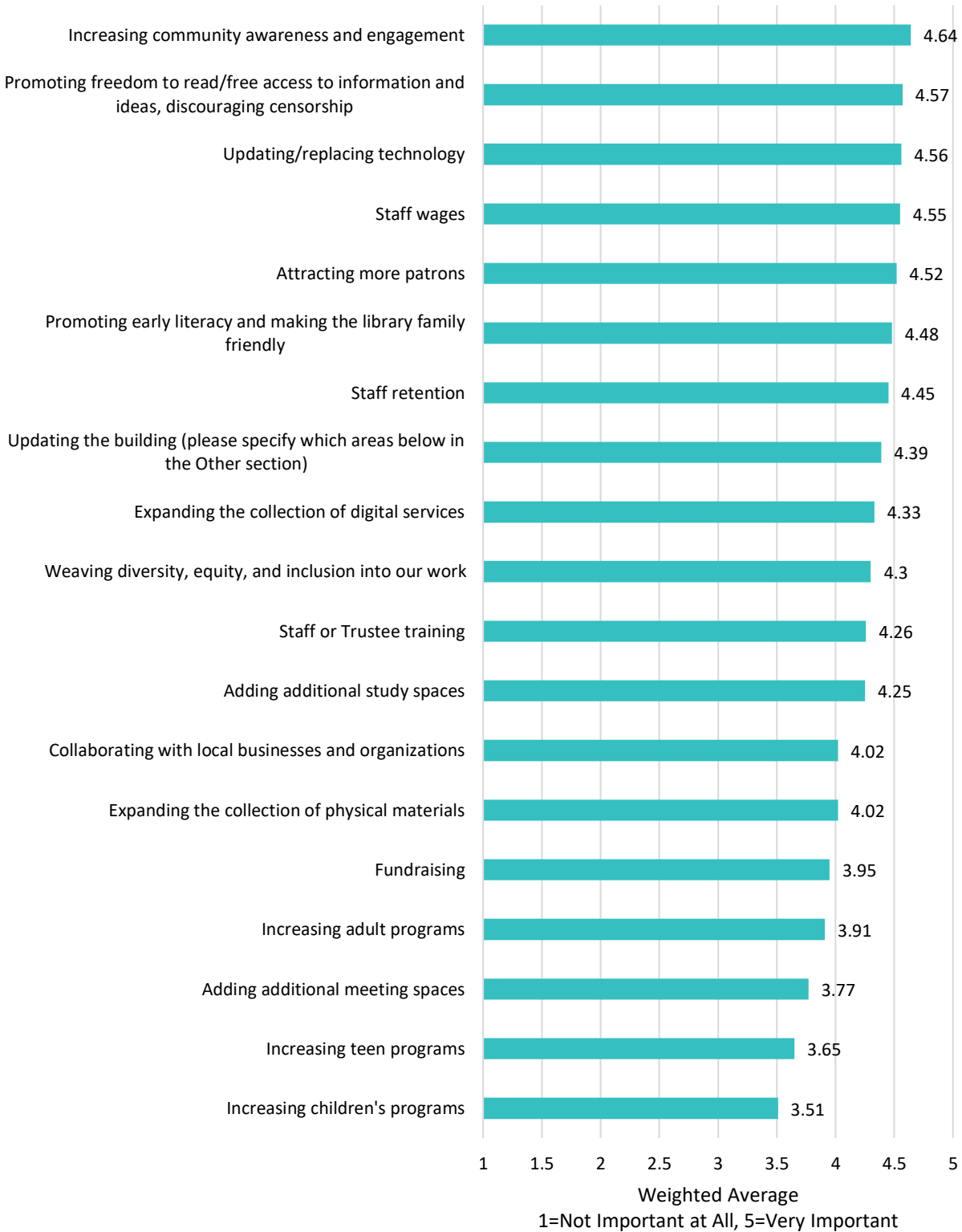
Board and Staff Survey Summary

For the Learning Report, we conducted a survey of board and staff members to provide an opportunity for input into the process beyond the environmental scan and SOAR analysis. Seven board members and 37 staff members participated. Below is a summary of their responses for each question.

What is your favorite thing about working at the library or serving on the Board?
<p>Public service, community, and leadership:</p> <ul style="list-style-type: none"> Helping patrons; interacting with patrons; serving instead of “selling”; interacting with the community; contributing to continuous improvement of FCL; helping people every day; guiding the library toward future success, growth, and stability; being a part of the community’s access to learning, literacy, programs, resources; staff want to create the best library for the community; diverse community
<p>Job satisfaction and relationships:</p> <ul style="list-style-type: none"> Working with other staff/co-workers; staff enthusiasm and passions; looking forward to coming to work; doing meaningful work; great work culture; positive working environment; wealth of mutual respect for one another; feeling safe to be who I am and express myself freely without judgement; the growth mindset of always wanting to improve
<p>Specific roles/tasks:</p> <ul style="list-style-type: none"> Love doing children’s programs/storytimes and serving/connecting with families; readers advisory with patrons; working with older adults; collection development and seeing items circulate; working with books; helping people find what they need

What’s working well at the library? What are we good at?
<p>Customer service and outreach:</p> <ul style="list-style-type: none"> Good at creating a welcoming environment; attentiveness; friendliness; caring and intelligent support to community; great outreach and participation at community events; many “regulars” and returning patrons; marketing; very patron-focused; serving families; serving seniors
<p>Programs/Events:</p> <ul style="list-style-type: none"> Amazing programming; something for everyone; high quality programs for all ages; children’s events and staff attendance at outreach events; wide variety of programs; good attendance at programs; ESL for adults
<p>Collections/Access/Readers Advisory:</p> <ul style="list-style-type: none"> Good at creating collections; great at suggesting books for patrons; great materials and resources; diverse collections
<p>Staff:</p> <ul style="list-style-type: none"> Dedicated staff who truly care about the library and community; motivated; welcoming; team-oriented; good at listening and addressing everything we can within reason; good at building lasting relationships; good sense of community; good at thinking on our feet
<p>Other:</p> <ul style="list-style-type: none"> Always trying to improve; appreciate PTO for part-time staff; good at responding to feedback; good at adapting to change; community values our work; patrons feel comfortable asking for help

When you consider the library's future, how important are each of the following items?



FINDINGS:

- Increasing community awareness and engagement was rated of most important to staff and board members.
- Respondents also rated promoting the freedom to read, updating/replacing technology, and staff wages as highly important.
- Of least importance were increasing adult programs, adding meeting spaces, and increasing teen and children’s programs.
- Respondents shared “Updating the building” areas of importance, summarized below.

“Updating the building”:

- Adding more study/quiet rooms and private seating/spaces for patrons
- New/updated furniture; more comfortable furniture
- Better lighting
- Updating and adding staff work spaces
- Update all department desks and wood shelving units
- Updating material handling system area and materials return
- Update all bathrooms that are not ADA accessible
- Adding a café or area that can provide healthier food than vending machines
- Update/add ADA accessible entrances and ramps, including staff entrances
- New carpet
- 12 Mile Children’s Department is “falling apart” and date with many broken/removed fixtures
- New furniture in Children’s Department, staff room, and outside the study room at Liberty Street location
- Add outdoor event space
- Better signage inside and outside
- Dangerous sidewalks at FA
- New air conditioning at FH
- Additional staff space needed at Farmington
- Children’s and Teen areas at both buildings
- More thoughtful use of spaces overall
- Attention to carbon footprint and add recycling bins for bottles/cans
- FH environment control (don’t have tech services and browsing areas on the same heating circuit)

Please share some ideas you have for how the library can work towards, implement, or expand the items that you indicated are important or very important in the list above.

Staffing:

- Training on difficult patron interactions; more interdepartmental communication and sharing to build teamwork; provide regular mechanism for staff to provide feedback; resolve staff issues quickly; focus on hiring diverse staff; attention to staff retention and career-building; increase pay to remain competitive with other libraries and other area employers; support self-care for staff and elevate the human elements of staff needs; more training for all staff; DEI trainings and meaningful incorporation into processes/policies

Programs/Events:

- Events highlighting use of the Cricut and 3D printer; programs that reflect more diversity; more well-known speakers; more special events, i.e., open house; social events for patrons; offer support groups; more music and author events; increase ESL services

Collections and Technology:

- Increase spending on digital materials; increase awareness and assistance for use of digital materials; upgrade tech, both physical and digital; need new public desktops; add software services; upgrade overall tech speeds; need at least 3 copies of each book; all new titles in digital as well as physical; weed and shelf-read all collections

Outreach/Marketing:

- Book mobile(s); pop-up events; partnering with community organizations to increase visibility; increase advertising through mailings/texts; collaborate with schools to promote reading tutoring for all ages; survey businesses on what the library can offer to benefit them; increased awareness of events and marketing with the cities beyond the Activities Guide; increase teen memberships by working with schools; better promote services outside of books/materials to help increase community understanding of all that funding provides; meet new patrons where they are, i.e., in their neighborhoods

Facilities:

- Spaces for private Zoom-type calls; clearer signage; quiet study/work-from-home spaces; many items face constant repairs, i.e., elevators, computers, vending machines; quiet phone call areas, i.e., phone booths; redesign stairwell to include ramp or elevator; update lighting

Other:

- Celebrate/acknowledge holidays for more cultures reflected in the community; focus group(s) with underserved community populations; increase dedication to makerspaces and DIY project areas; need a credit card reader on copy machines and LDS; annual plan for yearly timeline of objectives; capital drive for funding to update facilities

To more fully enjoy your work on behalf of the library what specific improvements would you recommend?

Training/Knowledge:

- More efficient, standardized, and welcoming onboarding process; more robust training

Operations/Processes:

- Stable scheduling and set work schedule; off-desk time for everyone to work on collections and trainings, etc.; provide laptops for off-desk time; improve functionality of Tech Services so we don't have to check everything coming from them; more copiers and print release stations

Staffing/HR:

- Fully staff all departments; provide higher pay; respect for staff; more social activities for staff; more opportunities to build connections between FA and FH staff; more equity and balance in job responsibilities/projects and types of programming required for staff; improved work culture and team building; trust-building through listening to staff opinions; resources for staff mental and relational health; review staff hierarchy and hours allowed; provide promotions on merit without having to apply for the next step up and/or as part of yearly evaluations

Facilities/Spaces:

- Consistent heating and cooling of the building; comfortable temperatures in work area; renovation of staff spaces for better productivity and collaboration; new buildings that the community can be proud of; soundproof phone call areas; more room for Circulation staff in back area and more computers; new paint; staff space for meditation and exercise; updated book drop; new carpet so that tears don't cause tripping hazard; loud noises in circ area at 12 Mile building

Other:

- Dinner at board meetings, perhaps funded by FOL; social gatherings for board outside of meetings; new carts at Liberty Street

How could the library help you better perform/succeed in your role at the library? What do you need to be a better Board/Staff member?

Training:

- Training focused on analytics; more and continued technology training; training on how to use the personnel resources; more time for professional development and training; more training on new equipment, i.e., 3D printer; training on databases; promote outside professional development, i.e., MLA, ALA

Staffing/HR:

- Opportunity to move up in responsibility, i.e., Library II, without having to be full time; hire part-time position to help with planning and implementing senior outreach activities; recognition and acknowledgement of staff's hard work; increase staffing; more maintenance staff

Operations:

- Equitable off-desk time; regular schedules; used to work 1 Sunday a quarter and now work 1 Sunday a month which affects quality of life; used to pay time and half on Sundays; consistent application of rules and expectations across all departments

Facilities/Spaces:

- Improve the physical environment; more comfortable furniture for staff

<p>Other:</p> <ul style="list-style-type: none"> • Board and staff events to better know and communicate with each other (willing to do this during staff work hours); want to feel like the Board is working with us and not against us as has happened in the past; better visibility of the board and interaction with staff; unified goals; more support in DEI work; more support in creating a welcoming and safe space and diverse collections reflective the community
<p>Positive comments:</p> <ul style="list-style-type: none"> • “We are well prepared by the board packet every month.” • “I already feel empowered to ask for what I need in order to succeed at my role.” • “I think the library staff does all that’s necessary for me to do my job as a board trustee.” • “Simple things like being acknowledged, smiled at, listened to, and cared about. I have experienced this at FCL and it makes me feel good about working here. It makes me want to stay and is motivating and encouraging.” • “I have been given constant support from my director, I do not currently have any needs that aren't being met, and I have faith that she would assist me in finding workable solutions should I need any in the future.” • “I think we do great things here!”

<p>What community needs are you aware of? What could the library do to address these needs?</p>
<p>Programming/Events:</p> <ul style="list-style-type: none"> • Programs that bridge socioeconomic, political, ethnic divides; multi-generational events/activities; more STEM/STEAM programs; adult programs for those without children held after working hours; offer some walk-in classes; more health-related programs for adults; more art and music programs; more digital literacy learning; tech/computer classes
<p>Services and Outreach:</p> <ul style="list-style-type: none"> • Add a notary service; send newsletter via mail to all residences; provide better understanding of all that the library offers/does (and does not do); outreach to and taking youth to Beaumont Commons; more communication with immigrant populations; continue working with schools to increase library awareness and attendance as well as reading skills
<p>Collections and Technology:</p> <ul style="list-style-type: none"> • More health and mental health resources; expand physical offering such as Library of Things, i.e., toys, tools; more cultural representation in materials
<p>Facilities/Spaces:</p> <ul style="list-style-type: none"> • Provide spaces for telehealth visits and Zoom calls; more quiet work spaces needed; ensure cleanliness of spaces
<p>Other:</p> <ul style="list-style-type: none"> • Provide space to bring together people from all different backgrounds; foster a sense of belonging in the community; some parts of community underserved because of geography and lack of transportation; continued need for DEI and support of right to free speech; transportation needed for seniors; more robust homebound services

Assume for a moment that money and time were no object and you could change one thing at the library to improve things, what would that be?

Facilities/Spaces:

- New, modern buildings; interactive outdoor spaces; an additional location to serve areas that lack transportation; electric vehicle chargers; drive through service windows; new automated material handler; circ desk closer to the circ work area; remodel and update both locations; bigger staff work spaces; more space at Liberty Street location; remodel shelving with better lighting and more accessibility and space for face-out materials; update overall building layout; soundproof work areas for staff

Staffing/HR:

- Scheduling; more staff; full-time staff dedicated to planning and teaching computer classes/courses on a variety of topics; promotions based on merit; improved staff wages and benefits; monthly recognition awards

Technology:

- New patron computers; upgrade copiers, scanners, printers, fax, credit card readers, etc.; standby tech help for patrons that is always available; faster internet speeds

Other:

- More free resources for the community, i.e., food pantry, tutoring; more advertising via multiple media outlets; two book mobiles; book vending machine at the community center

Focus Groups and Interviews

Why focus groups and interviews?

Most strategic planning efforts include community surveys to learn about the resources, programs, and services that are most important. This information helps the library strategically move into the future knowing they will be connecting people with the things they want and need. Surveys are typically completed by people who are already aware of library services. In order to hear opinions from people not represented in that group, other methods are required. The consultants at Fast Forward Libraries are augmenting survey results with focus groups and one-on-one interviews. The overall goal of the focus groups and interviews, conducted early in the planning process, is to ensure the library hears from people who may not typically respond to a library survey and from targeted stakeholders within the community.

Overall community aspirational themes

Three essential themes rose to the top via these focus groups and interviews:

1. **Plan for a higher quality of life for all** - A municipal plan should be in place in which all people can meet their basic human needs, and achieve a higher quality of life.
 - a. People want an intentional municipal plan that moves the community forward together toward becoming a prime example of a high tech, culturally diverse place to live, work, learn, and play.
 - b. A diverse region should have diverse leadership; people want to see others like themselves in municipal and community leadership positions.
 - c. New residents are welcomed into the community and can easily find information on community resources like school systems, college opportunities, home ownership, English classes, and volunteerism.
2. **Build community spirit** - People want to know their neighbors and feel a sense of connectedness to their community.
 - a. The Farmington region should be open and welcoming to all, with public gathering places, activities, and events to bring people together.
 - b. Honor and celebrate the incredible diversity of cultures in the region.
3. **Improve communication** - People want one-stop-shopping for the programs, events, services, and social opportunities occurring in Farmington, Farmington Hills, and the surrounding areas. The hope is that a community that plays together can tackle hard conversations together.
 - a. Civil civic conversation between diverse people is necessary to move forward together.
 2. It must be easy to find and understand the many resources and programs people need to improve their quality of life and to connect them with others.

In short, people want to feel welcomed and connected to a diverse community that provides for all, and celebrates and honors its many cultures.

Methodology and Results

Mapping the Farmington Public Library communities

Community mapping is a process that encourages people to brainstorm and list the many organizations and stakeholders that make up their diverse communities. Select library staff members, representing a variety of Farmington locations and services, mapped their local communities in order to inform selection of focus group and one-on-one interview participants.

The expertise of local library staff provided essential insight in raising up diverse voices.

Via a small planning work group made up of 3 library staff members with deep ties to the community, a long list of possible interviewees and focus group participants was brainstormed. Those lists were refined to include participants for the 6 focus groups and 9 one-on-one interviews detailed below. This staff exercise gave Fast Forward Libraries consultants a library perspective and sufficient comprehension of Farmington and Farmington Hills assets and community needs, revealing which non-library users may be absent from library discussions. From that local-level base of knowledge, library leadership prioritized community participants, and set focus groups and interviews.

The opinions captured through all of these engagement methods—focus groups, interviews, and surveys—will enhance current library services and allow the library to further explore new innovative and inclusive services in the communities across their service area.

Focus groups

Virtual and in-person focus groups were scheduled for 60 minutes and lasted between 45 and 90 minutes each. They were roughly structured according to the Harwood Institute’s [Aspirations Exercise](#). Focus groups took place virtually and in-person in October and November 2022. The consultant used Google Jamboard to virtually facilitate discussion. Flip charts and markers were used for in-person focus groups, which were conducted November 10 -11.

What are your ASPIRATIONS for your community?



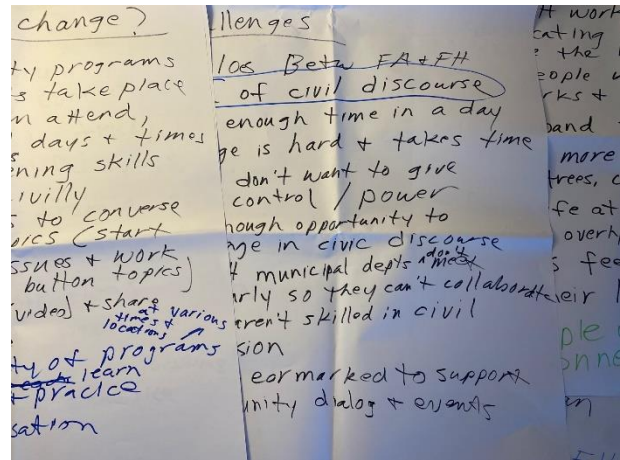
Screenshot of a virtual focus group using Google JamBoard

Cindy Fesemyer, a Fast Forward Libraries consultant, conducted three virtual focus groups and three in-person—as part of the strategic planning community engagement effort. The groups included representatives from:

- Local parents
- Non-native English speakers
- Retirees
- Members of the Muslim Community Mosque and Tawheed Center
- Friends of the Library
- The community at large

The focus groups brought people together virtually and in-person to share their opinions on their community via a facilitated meeting. The facilitator asked people to brainstorm and discuss the following questions:

- What are your aspirations for your community?
- What challenges do you face in trying to reach those aspirations?
- What needs to change in order to overcome those challenges to achieve your aspirations?



Flip chart brainstorm from an in-person focus group

After widely brainstorming answers to each of these questions, participants mutually agreed upon the top theme for each question. Those top themes were carried forward into a narrative that shows their progression from aspirations to challenges to necessary change. The distilled narrative gets at the heart of the wants and needs for communities through the eyes of that particular focus group.

Their efforts resulted in informative community narratives crafted by focus group participants. In no particular order they wrote:

We want a community where people are connected with each other in truly inclusive and respectful ways, but we suffer from a lack of civil discourse. To achieve our aspirations, we need a great variety of community programs - various days, times, locations, ages - to connect, learn, and practice civil conversation.

We want to invest time, money, emotions, and intelligence in building our community, but change here isn't community-based. To achieve our aspirations, we need to create avenues for empathetic community interaction and a culture of giving back.

We want more multi-age socializing in the community with easy public transport to and from, but we don't have a collaborative community leader to lead the effort. To achieve our aspirations, we need youth to have a community spirit and want to connect and participate in those programs.

We want a closer connection to the community, but we face the challenge that American people don't accommodate other cultures very well. To achieve our aspirations, we need clear communication about community programs and services so we can be more involved.

We want diverse people to be aware of community needs and to be part of the community leadership structure, but there is a lack of awareness and information on social issues. To achieve our aspirations, we need to see a clear path to getting involved in the local leadership process.

We want a more inviting vibe for all people, but there is fear of change that threatens the status quo. To achieve our aspirations, we need a larger spectrum of opinions from the people in power.

Within these carefully crafted narratives the themes of *communication, connection, and building community spirit* are clear.

Overall, people want to maintain the high quality of living in the area while finding and participating in a greater sense of community. A few challenges in the way of that aspiration include:

- Local leadership does not reflect the demographics or far-ranging opinions of the very diverse community.
- There is no single point of information for community services and programs.
- It is not clear how to volunteer in the community or get involved in local leadership.

Interviews

Interviews were scheduled for 30 minutes and lasted between 25-45 minutes each. They were loosely structured according to the SOAR method which collects Strengths, Aspirations, Opportunities, and Results. Due to time constraints, emphasis was placed on the opportunities and aspirations portions of the method. The SOAR method comes from the Aspen Institute, [Dialogue on Public Libraries](#), and report, [Rising to the Challenge: Re-Envisioning Public Libraries](#), (2014) and resulting [Action Guide for Re-Envisioning Your Public Library](#) (2017). Participants participated in interviews via a consultant-provided Zoom link.

Cindy Fesemyer conducted 9 virtual interviews as part of the strategic planning community engagement effort. The individuals interviewed included stakeholders throughout Farmington and Farmington Hills, from local educators, to elected officials, to non-profit leaders.

Cindy Fesemyer asked participants about themselves, their community, and their library:

- What do you do for a living? How do you spend your days?
- Where do you live? How long have you lived there?
- What kinds of changes have you seen in your community in that time?
- What do you want for your community?
- What's an ideal future for your community 10 years down the road?
- Do you yourself utilize the library? How often, and in what ways?
- What do you want for your library?
- What an ideal future for the library 10 years down the road?

Themes and key take-aways arising from the interviews are organized into Community Aspirations and Library Aspirations categories. That is, what did interviewees most want for their communities and what did they most want for their library. Themes arising from the interview, starting with those most frequently mentioned, include:

Community Aspirations

People generally acknowledge and appreciate the privilege it is to live in the Farmington/Farmington Hills area. In order to remain an excellent place to live, they would like to see the community concentrate on developing these areas moving forward:

Achieve high quality of life

- Create a collective force focused on community services and recreation millage that allows the library, township, senior center and schools to plan for and spend community dollars in support of a big vision, together.
- As the community ages, people want amenities and services to age in their homes
- Focus on civil civic discourse.
- Direct quote: “Listening to learn, not listening to defend.”

Provide for basic needs

- Equity, diversity and inclusion (EDI) should be a priority, including more diversity on municipal committees and in community leadership positions
- More affordable housing
- Actively address crime issues
- Public transit solutions, walkability, bikeability

Community connections

- More ways for people to connect with each other
- Centralized marketing of community events
- Forums for civil discussion
- Direct quote: We need more people “listening to learn, not listening to defend.”

Library Aspirations

It is clear that interviewees appreciate their local library. Interviewees’ aspirations for their libraries center around the library formalizing and strengthening its role as a **Community Connector**. Specifically, people want the library to:

Continue to provide stellar traditional library services

- Continue providing print reading materials, study spaces, literacy services people of all ages, and access to community resources
- Keep up on maintenance of facilities
- Remain a high-quality technology center
- Direct quote: I want “the community to continue to see and prioritize the library as a community-learning asset and anchor.”

Become THE community hub for all

- Create more strong community partnerships and collaborations
- Become a consortium of cultural sharing

- Create a library staff Community Liaison position
- Go where the people are making use of pop-up libraries and satellite locations
- Direct quote: The library should be “ground zero for really cool community activity and learning.”

Provide better community communication and connection

- Increase library marketing efforts
- Direct quote: “The library is about people interacting with people. We need to widen the scope.”

Opportunities

Welcome hub

From the Board SOAR session to the community focus groups, a thread that winds throughout aspirational brainstorming is the idea that the library become an intentional welcome center for people in need. This means the library providing support services themselves and/or rereferrals to community agencies on a plethora of topics. Specifically, and most exciting, the library can and should be THE welcome hub for new residents.

Given the rapid increase in ethnically diverse residents from 2010 – 2020, and the proximity to the Detroit auto industry and other tech and manufacturing centers, Farmington and Farmington Hills are magnets for new international residents. The library is already serving the needs of these new residents; however, opportunity lies in being *purposeful and methodical* in creating a menu of program and service options for the community. Convening stakeholders and co-creating a single point of entry (one-stop-shopping) for information on community information, programs, and services is a natural fit for the library. Far-reaching, comprehensive marketing of those services and programs would fulfill many aspirations of those who shared their opinions throughout the planning process.

Further, the library might formally take the lead in regularly celebrating the incredible diversity of the region. Structured collaboration with the municipalities and the area nonprofits that serve new residents would go a long way in creating the support network required to regularly host community-wide celebrations that honor the holidays and customs of the many cultures represented in the area. With an eye toward fulfilling another community aspiration—expanding outdoor event spaces, perhaps on the library lawn—the library could position itself to be the premier host of these celebrations and opportunities.

Placemaking

Community data, interviews and focus groups reveal a need for “placemaking” within the Farmington region. The process of placemaking has the potential to bring together truly diverse communities to co-invent new places and events for the community. These places need not be expensive new buildings or public squares. A way to start small is to inventory existing public spaces and imagine new uses for them. As an example, the library lawn might host a regular music program to bring people together.

In addition to imagining new uses for existing indoor and outdoor places, placemaking also brings people together around a common cause. The library has an opportunity to help the diverse community celebrate the many cultural traditions represented in the region. Overwhelmingly, focus group participants and interviewees expressed the desire to get to know their neighbors and participate in the community. Placemaking does exactly that. It creates a tie between groups of people and the places

they inhabit. When people invest in their spaces and places, they are connected to the community. These connections pay future dividends as these co-created places create value, attracting new residents to the area.

Creating community is a natural role for the library to take as it plans for the coming years. When communities are strong, that's when you begin the difficult conversations around political and socio-economic issues that were called for in the focus groups and interviews. To have "real talk," people must first know each other. Then they need to trust each other. Placemaking can start creating these new relationships around fun community efforts with visible outcomes.

With a lack of free public gathering places in the Farmington region, it is imperative to reinvent the ways the library brings people together. The library can assert itself as a leading community organization that helps people achieve their aspirations. This gives the library some local cache that may be useful in future efforts. Of course, FCL cannot and should not do this work alone. Partnering with community organizations, the municipality, and individual leaders with similar interests will help bring community volunteers to the table as places are imagined and planned. The more people that get involved, the further the good news spreads of all the library is doing for and with residents. Indeed, focus group and interview participants called out this need for collaboration between community partners as a need within the area.

More on placemaking can be found at the [Project for Public Spaces](#).

Limitations and strengths of community assessment activities

Limitations

Focus groups always have talkers and listeners. Despite the efforts of the facilitator, some of the talkers took over portions of the discussions. To remedy that, the facilitator watched body language and called on those who weren't finding opportunity to interrupt the conversation, or called on those who hadn't spoken in a while.

Strengths

The community mapping exercise that began the community engagement portion of this project involved knowledgeable staff members representing deep community connections across the region. Those connections resulted in access to highly diverse individuals and groups of people representing many different cultures, ages, languages, educations, and economic levels. The facilitator was able to glean a lot of first-hand knowledge of community wants, needs, and dreams. Kudos to the library team for making this possible.

To the one, each interviewee and member of a focus group was open and honest about their opinions and ideas.

Focus group participants were able to dig deep into topics as they bounced ideas off of each other, expanding upon some ideas and quickly moving away from others. People who did more listening to the discussion often encapsulated the conversation for the group when given the opportunity. The facilitator found their summaries very useful.

Community Scan

City and Local/Regional Amenities

The cities of Farmington and Farmington Hills, located in the northwestern suburbs of Detroit, MI, make up the service area of the Farmington Community Library (FCL). Farmington Hills is the second largest city in Oakland County with over 80,000 residents, while the smaller Farmington has approximately 10,500 residents. FCL has a location in each city, serving over 90,000 residents in the two communities.

Farmington boasts a vibrant and historic downtown district where the FCL Farmington branch is located on Liberty Street. The Downtown Master Plan indicates the city is highly invested in development, growth, and walkability of the downtown area with specific objectives to “increase public transportation services,” “make downtown easily navigable,” and “create new public spaces.” The 2023-2028 Capital Improvement Plan identifies significant and potential parking projects one of which could require land sharing with the library (p. 17). The capital improvement plan also outlines a municipal broadband infrastructure project that will impact both Farmington and Farmington Hills (p.22).

Farmington Hills’ most recent “Master Plan for Future Land Use” was adopted in 2009, and the City is currently reviewing and updating the plan. [Public input is sought](#) to help inform needs, and the plan adoption is projected for Summer 2023. The plan will address housing, transportation, community wellness, sustainability, and overall economic development.

Farmington Hills provides residents with a wealth of amenities including a municipal Activity Guide that details the programs, events, and recreation offerings of The Hawk Community Center, the Costick Activities Center, and other community locations including FCL. The Hawk Community Center is located on W. 12 Mile Road and provides indoor and outdoor fitness and sporting opportunities, a new creative makerspace, a new esports/gaming center, and a wide variety of programs and workshops including art, dance, theatre, music, after-school programming, and “Adults 50 and Better” activities. Awareness of areas where FCL can partner with these community centers and where the library can seek to avoid unnecessary duplication of services should be a consideration.

Education

K-12 enrollment in Farmington Public Schools (FPS) totaled 8,776 students during the 2021-2022 school year. As compared to the 2020 overall racial diversity of the cities (with 67.8% and 62.1% white populations in Farmington and Farmington Hills, respectively), 48.8% of the district’s ’21-’22 students were white, 26.2% were African American, 14.9% were Asian, 5.1% were two or more races, and 4.4% were Hispanic. The district shared a strategic plan update in June 2021 with 5 priority areas and 8 goals including a “Community Relations” goal for which they hope to “develop partnerships/enrichments that focus on increased student opportunities.” Another goal area involves the FPS Futures Committee and seeks to “work with FPS profile of a lifelong learner to explore paths forward for future learning opportunities.” FCL could be natural partners in both of these FPS goal areas.

In addition to traditional public education for youth, FPS offers adult ESL courses for beginner, intermediate and advanced learners. Classes are offered in-person and online. Career Training Education Cohorts are also offered, and childcare is offered for parents enrolled in courses. A partnership with

these courses could be a unique opportunity for FCL to reach new patrons and expand services to diverse populations.

The Orchard Ridge Campus of Oakland Community College (OCC) is located in Farmington Hills. OCC is the largest community college in Michigan with more than 14,000 students enrolled in Fall 2021. Oakland and Wayne State Universities are the top transfer universities for OCC students. Oakland University's Office of Community Engagement provides potential for area nonprofits to engage as community partners in student service learning and collaboration. Wayne State University's service learning- focused curriculum within their School of Medicine could be another collaborative partner for FCL. Students are required to complete 35 hours of service learning working with the area's vulnerable populations.

Healthcare

The 2019 Community Health Needs Assessment for Beaumont stated chronic disease prevention and management (including obesity, diabetes, and heart disease) and mental health as the top regional health priorities to be addressed. For each of these areas, community partners are listed such as Farmington Public Schools and Farmington Parks and Recreation. FCL could easily become an additional partner in addressing these community health priorities going forward, helping to connect patients to community resources and providing health-related programming and educational opportunities.

Business and Workforce Trends

The 2020 Census data shows that Farmington and Farmington Hills residents have average commute times of 25.7 and 25.5 minutes respectively. These times are increases of just over 2 minutes (Farmington) and 1 minute (Farmington Hills) compared to 2010 commutes. Moreover, in 2020, 8.8% of workers in Farmington and 8.1% of workers in Farmington Hills worked from home. This is an increase from 5.2% in Farmington and 3.8% in Farmington Hills in 2010. These patterns show that workers are commuting for longer amounts of time which may provide an opportunity to market audiobooks and other streaming audio materials to them. Workers who now work from home may have different library needs for quiet work/study space at the library, as well.

Community Foundation

The Farmington and Farmington Hills Foundation for Youth and Families is a local community foundation providing grant funding and support to local organizations that aim to address the social and cultural needs. FCL fits the foundation's vision of funding "organizations and programs that serve youth and families in our community". With spring and fall grant cycles, the foundation could be a potential source of program or project funding for FCL.

Sources:

- [2020 and 2010 Census Data for Farmington and Farmington Hills – Selected Economic Characteristics](#)
- [Beaumont, Farmington Hills – 2019 Community Health Needs Assessment and Implementation Strategy](#)
- [The City of Farmington and Capital Improvement Programs 2023-2028](#)
- [Farmington & Farmington Hills Foundation for Youth & Families](#)

- [Farmington Public Schools](#)
- [FPS – ESL Information](#)
- [FPS – Strategic Plan Update](#)
- [Imagine Farmington – Downtown Master Plan 2016](#)
- [Master Plan, Farmington, Michigan 2019](#)
- [Master Plan, Farmington Hills, Michigan 2009](#)
- [Master Plan Update Information, Farmington Hills, Michigan 2022](#)
- [Michigan School Data](#)
- [Oakland Community College – Community Connections](#)
- [Oakland University](#)
- [The Hawk Activities Guide for Farmington Hills](#)
- [Wayne State University – Service learning and community engagement](#)

Appendix: Community Data

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Population	326,569,308	9,973,907	10,380	10,520	80,191	80,937
Median Age	38.2	39.8	39.4	38.2	41.4	42.8
Median Household Income (in \$)	64,994	59,234	64,805	78,875	67,803	85,152
Homeownership	64.4%	71.7%	64.4%	62.4%	65.8%	62.0%
Housing Value (Owner-occupied, in \$)	229,800	162,600	185,000	221,500	238,300	270,000
Below Poverty Level*	12.8%	13.7%	9.0%	5.6%	7.5%	6.8%
Average Household Size	2.6	2.45	2.28	2.19	2.36	2.30
Average Family Size	3.21	3.05	2.95	2.92	2.96	3.01

Sources:

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, [S0101](#), [S1701](#), [S1901](#), [DP04](#), [S1101](#)

ACS 2010 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, [S0101](#), [S1901](#), [DP04](#), [S1101](#); *2012 [S1701](#) – 2012 poverty level data used, 2010 data not available

Age Distribution

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Total population	326,569,308	9,973,907	10,380	10,520	80,191	80,937
Under 5 years	6.0%	5.7%	7.0%	5.6%	5.1%	5.1%
5 to 9 years	6.1%	5.9%	5.7%	4.8%	5.4%	4.4%
10 to 14 years	6.5%	6.2%	7.0%	5.5%	6.8%	5.3%
15 to 19 years	6.5%	6.6%	6.6%	3.6%	6.8%	4.9%
20 to 24 years	6.7%	6.9%	3.6%	5.1%	4.8%	6.3%
25 to 29 years	7.1%	6.8%	5.0%	9.6%	6.5%	7.7%
30 to 34 years	6.8%	6.1%	8.1%	11.3%	5.6%	6.6%
35 to 39 years	6.5%	6.0%	7.8%	7.0%	7.0%	6.6%
40 to 44 years	6.1%	5.7%	8.2%	5.6%	7.2%	5.1%
45 to 49 years	6.3%	6.3%	6.6%	5.4%	8.1%	6.4%
50 to 54 years	6.4%	6.7%	7.1%	6.4%	8.4%	7.7%
55 to 59 years	6.7%	7.1%	7.5%	7.5%	7.6%	6.5%
60 to 64 years	6.2%	6.9%	5.0%	5.5%	5.5%	7.0%
65 to 69 years	5.3%	5.8%	3.3%	5.1%	3.7%	6.0%
70 to 74 years	4.1%	4.3%	2.8%	5.7%	3.3%	5.3%
75 to 79 years	2.8%	2.9%	3.1%	2.3%	2.9%	3.6%
80 to 84 years	1.9%	1.9%	2.6%	0.9%	2.8%	2.2%
85 years and +	2.0%	2.2%	3.0%	3.1%	2.6%	3.3%

Sources:

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, 2020 [S0101](#)

ACS 2010 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, 2010 [S0101](#)

Diversity

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Total Population	331,449,281	9,973,907	10,380	10,520	80,191	80,937
White alone	61.6%	73.9%	71.4%	67.8%	71.1%	62.1%
Black or African American alone	12.4%	13.7%	10.6%	9.1%	15.6%	18.5%
American Indian and Alaska Native alone	1.1%	0.6%	0.1%	0.0%	0.2%	0.3%
Asian alone	6.0%	3.3%	15.7%	16.4%	11.0%	14.3%
Native Hawaiian and Other Pacific Islander alone	0.2%	0.0%	0.0%	0.0%	0.1%	0.1%
Some Other Race alone	8.4%	2.2%	0.1%	1.1%	0.4%	0.7%
Two or More Races	10.2%	6.3%	2.0%	5.5%	1.5%	4.0%

Sources:

DEC 2020 Redistricting Data for US P1; ACS 2020 5-Year Estimates for MI, City of Farmington, and Farmington Hills, [C02003](#)

ACS 2010 5-Year Estimates for MI, City of Farmington, and Farmington Hills, [C02003](#)

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Total Population	326,569,308	9,973,907	10,380	10,520	80,191	80,937
Hispanic Population	18.2%	5.2%	2.1%	2.5%	2.1%	2.3%

Sources:

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, [S0601](#)

ACS 2010 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, [S0601](#)

Education

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Population 25 years and older	222,836,834	6,853,674	7,268	7,932	57,053	59,911
Less than High School graduate	11.5%	8.7%	4.6%	2.3%	6.0%	4.3%
HS or Equivalent	26.7%	28.5%	15.7%	13.0%	17.7%	14.9%
Some College or Associate's Degree	28.9%	32.8%	25.7%	27.6%	24.9%	25.5%
Bachelor's Degree	20.2%	18.3%	29.4%	35.3%	28.6%	29.5%
Graduate or Professional Degree	12.7%	11.7%	24.7%	21.9%	22.7%	25.7%

Sources:

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, [S0601](#)

ACS 2010 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, [S0601](#)

Languages

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Population 5 years and over	306,919,116	9,405,581	9,649	9,934	76,117	76,819
English Only	78.5%	90.3%	80.2%	80.1%	78.6%	76.3%
Spanish	13.2%	2.9%	0.4%	1.4%	1.5%	1.5%
Other Indo-European languages	3.7%	2.9%	8.5%	8.5%	9.3%	8.2%
Asian/Pacific Islander languages	3.5%	1.7%	9.3%	8.8%	6.3%	8.2%
Other languages	1.1%	2.2%	1.5%	1.1%	4.2%	5.8%
Speaks English less than "very well"	8.2%	3.4%	5.8%	3.5%	6.9%	6.5%

Sources:

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [S0601](#), [S1601](#)

ACS 2010 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [S0601](#), [S1601](#)

Employment and Poverty

	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
US CENSUS DATA						
Civilian Labor Force (16+)	164,759,496	4,956,499	8,148	8,806	65,077	68,175
Employed	59.6%	57.7%	62.7%	66.2%	62.2%	62.9%
Unemployed	3.4%	3.7%	3.9%	1.7%	4.3%	3.1%
Armed Forces	0.4%	0.1%	0.0%	0.0%	0.0%	0.0%
Not in Labor Force	36.6%	38.5%	33.5%	32.1%	33.5%	33.9%
BELOW POVERTY LEVEL*						
All People	12.8%	13.7%	9.0%	5.6%	7.5%	6.8%
Under 18 years	17.5%	18.8%	8.0%	2.3%	9.0%	5.0%
18 to 64 years	12.1%	13.4%	8.5%	5.2%	7.0%	6.5%
65+ Years	9.3%	8.5%	12.2%	10.6%	7.1%	9.1%

Sources:

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [DPO3](#), [S1701](#)

ACS 2010 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [DPO3](#)

*ACS 2012 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [S1701](#); 2010 data not available

Marital Status

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Total (Ages 15+)	265,832,167	8,199,786	8333	8849	66294	68969
Never Married	33.5%	33.2%	28.1%	29.6%	27.0%	30.7%
Married	48.1%	48.1%	52.7%	53.6%	55.0%	51.1%
Divorced or Separated	12.7%	12.8%	12.0%	10.6%	11.2%	11.8%
Widowed	5.7%	5.9%	7.2%	6.2%	6.8%	6.5%

Sources:

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [S0601](#)

ACS 2010 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [S0601](#)

Income

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Total Households	122,354,219	3,980,408	4,469	4,747	33,591	34,803
Less than \$10,000	5.8%	6.4%	4.2%	3.7%	3.5%	4.0%
\$10,000 to \$14,999	4.1%	4.1%	2.4%	2.8%	3.4%	3.0%
\$15,000 to \$24,999	8.5%	9.2%	7.5%	6.4%	9.0%	6.8%
\$25,000 to \$34,999	8.6%	9.6%	9.8%	8.6%	8.7%	6.0%
\$35,000 to \$49,999	12.0%	13.3%	14.2%	12.9%	12.4%	8.6%
\$50,000 to \$74,999	17.2%	18.2%	21.0%	12.3%	16.9%	16.3%
\$75,000 to \$99,999	12.8%	12.9%	13.6%	17.8%	13.9%	12.6%
\$100,000 to \$149,999	15.6%	14.6%	14.9%	14.3%	15.5%	18.6%
\$150,000 to \$199,999	7.1%	5.9%	8.0%	12.3%	9.1%	12.7%
\$200,000 or more	8.3%	5.7%	4.5%	8.9%	7.8%	11.3%
Median income (dollars)	64,994	59,234	64,805	78,875	67,803	85,152
Mean income (dollars)	91,547	80,803	80,293	99,495	92,846	114,743

Sources:

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [S1901](#)

ACS 2010 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [S1901](#)

Disabilities

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2012 *	City of Farmington 2020	Farmington Hills 2012	Farmington Hills 2020
Total Civilian Noninstitutionalized Population	321,525,041	9,866,076	10,323	10,420	79,746	80,572
Ambulatory Difficulty	6.8%	7.6%	2.8%	4.8%	3.2%	6.5%
Cognitive Difficulty	5.1%	6.0%	2.5%	4.7%	3.4%	4.3%
Hearing Difficulty	3.6%	3.9%	1.9%	4.1%	2.8%	3.7%
Independent Living Difficulty	5.8%	6.5%	2.1%	5.4%	3.6%	6.2%
Self-Care Difficulty	2.6%	2.9%	2.6%	2.0%	3.2%	2.9%
Vision Difficulty	2.4%	2.2%	2.5%	1.3%	3.4%	2.1%

Sources:

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [S1810](#)

*ACS 2012 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills [S1810](#); 2010 data not available

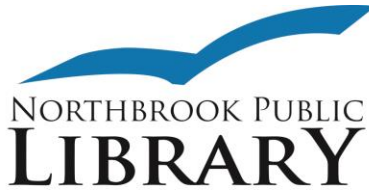
Housing

US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Homeownership Rate	64.4%	71.7%	64.4%	62.4%	65.8%	62.0%
US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Housing Units	140,498,736	4,570,173	4,959	5,501	36,178	37,352
US CENSUS DATA	US 2020	MI 2020	City of Farmington 2010	City of Farmington 2020	Farmington Hills 2010	Farmington Hills 2020
Total Households	122,354,219	3,980,408	4,469	4,747	33,591	34,803
Married Couple family	48.1%	46.9%	47.7%	44.6%	52.4%	47.3%
Cohabiting Couple	6.5%	6.9%	*	5.4%	*	4.3%
Male Householder	17.8%	18.7%	4.0%	18.7%	3.7%	20.1%
Female Householder	27.6%	27.5%	11.5%	31.3%	8.9%	28.3%
Householder Living Alone	28.0%	29.9%	33.3%	36.3%	30.0%	34.5%
65+ Householder Living Alone	11.3%	12.3%	13.8%	15.0%	10.4%	16.6%

ACS 2020 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, [DP02, H1, S1101](#)

ACS 2010 5-Year Estimates for US, MI, City of Farmington, and Farmington Hills, [DP02, H1, S1101](#)

*Cohabiting Couple information not recorded prior to 2019



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STRATEGIC PLANNING SERVICES RFP COVER SHEET

Name: Julia Prince, Managing Director

Organization: The Ivy Group, Ltd.

Email: jprince@ivygroup.com Phone: 434.979.2678

Address: 1001 East Market Street, Suite 202

City/State/Zip code: Charlottesville, Virginia 22902

Checklist:

- A list of key personnel
- A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in strategic planning.
- A work plan that includes
 - a description of the methodology,
 - list of tasks,
 - project timeline, and
 - estimated total amount of time that would be spent on the project.
- Exclusions or exceptions.
- A schedule of costs that includes
 - consulting,
 - supplies,
 - number of onsite and virtual visits and cost per trip, and
 - other costs associated with the planning process.
 - data gathering and analysis (community research component) must be listed separately.
- List of 2-3 references of libraries or nonprofits who have been your clients within the last three years, including names, contact information

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PROPOSAL FOR STRATEGIC PLANNING SERVICES

Northbrook Public Library

We have witnessed the enormous impact libraries have on the people they serve. Our projects have ranged in size and scope, challenges, and opportunities, but one fact remains constant: we are passionate and effective advocates for libraries.



Contact

Julia Prince

jprince@ivygroup.com

ivygroup.com

1001 East Market Street, Suite 202

Charlottesville, Virginia 22902

434.979.2678

April 10, 2023

Kate Hall, Executive Director
Northbrook Public Library
1201 Cedar Lane
Northbrook, IL 60062

Dear Ms. Hall,

Thank you for the opportunity to present this proposal for strategic planning. NPL, like other award-winning libraries, faces challenges in continually meeting high expectations. Today it faces a particularly tricky set of tasks: assessing the needs and expectations of a changing population amid new, post-pandemic norms; maintaining virtual and hybrid programming while meeting increasing demand for in-person programming; increasing sustainability and EDI; and fostering ever greater connection and engagement. These are just the sort of complex challenges we delight in tackling.

At the Ivy Group, we're proud to have performed planning services for more than a hundred public libraries and library organizations across the United States. We use that experience to make your investment in our services as valuable as can be. That value begins with taking up the burden of project management and culminates in the long-term benefits of efficient and responsive operations for years to come.

At The Ivy Group, our hallmarks are:

- ◆ Comprehensive research and analysis. As one recent client put it, "What set you apart was how you were approaching finding out about the community by attacking it from multiple levels.... The multiple pipelines helped draw the picture that we needed to see. It was worth more than the sum of its parts. A true deep dive."
- ◆ Community engagement which builds support for and use of library services. This includes engaging non-users and populations which might traditionally be underrepresented or underserved, to provide a basis for increasing participation and equity.
- ◆ A planning process which fosters internal know-how and cohesion. Many of our clients tell us how much they appreciated the professional growth opportunities and the way the planning sessions stimulated an energetic can-do optimism around outcomes. We know how to navigate complex relationships, turn insights into action, and build consensus.
- ◆ Forward-thinking and actionable plans. We understand how to make plans that are both innovative and practical, and we work closely with your team members to get deliverables done on time and as promised.



Our clients tell us they value our team's facilitation skills, ready availability, and accommodating work style. They also report that they use their implementation dashboards to routinely check progress against the goals set forth in their plans, and we take this as a great compliment on the work we produced together.

The following proposal outlines our approach and qualifications. I hope that it also conveys our very great enthusiasm for partnering with Northbrook Public Library in charting a course to sustainable excellence.

With best regards,

A handwritten signature in black ink, appearing to read 'Julia Prince', written in a cursive style.

Julia Prince
Managing Director



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Executive Summary

Ivy Group and Northbrook Public Library will engage in a collective process to craft a strategic plan with visionary goals and clear tactics for implementation. The plan will be based on a comprehensive community profile, deliberate engagements with residents, and direct involvement from internal and external stakeholders.

	Methodology	Outcome
Discovery	Community Snapshot	Understand the context in which NPL operates, including changes to the community since the previous strategic plan
	Library Environment Assessment	Quantify NPL's resource allocation and identify areas for output improvement
	[Optional] Board Member Interviews	Invite candid feedback on NPL's organizational health from budget and policy makers
	Planning Session	Get a pulse on the community and NPL, and envision transformations for both
Community Assessment	Community Leader Interviews	Develop new connections and strengthen existing relationships with those who represent underserved groups who may be hesitant to directly participate in the planning process
	Community Survey	Collect quantitative data on satisfaction with NPL services and qualitative feedback on the Library's role in shaping the community's future from all residents who wish to participate
	Market Segmentation	Calculate which households do and do not use the Library, learn about their consumer and communication behaviors, and identify appealing new services
	[Optional] Community Conversations	Engage users and non-users in conversations that build a community vision and uncover barriers to equitable service delivery
Plan Dev.	Implementation Workshop + Plan Development	Collaboratively synthesize everything we've learned into a responsive, flexible roadmap
	[Optional] Plan Presentation	Promote the plan and build enthusiasm for the journey ahead



About The Ivy Group

The Ivy Group is a full-service marketing and strategic consulting firm. A close-knit working group, we combine our library experience, business and communications expertise, and enthusiasm for supporting communities to advance America's libraries.

Founded in 1989 by a teacher and a librarian, The Ivy Group is a privately held small business with 100% female ownership, certified as a SWaM vendor (#662737) by the Commonwealth of Virginia. We are members of the American Library Association and Public Library Association.

Our Team



Julia Prince, Managing Director (she/her)

Julia leads Ivy's day-to-day operations and serves as a researcher, strategist, and account manager for a variety of clients in the public and private sectors. With nine years of library consulting experience and a quickly expanding portfolio of over thirty library clients throughout the country, Julia leads strategy development while overseeing the research effort for all strategic planning projects.

Equally comfortable in the trenches of a spreadsheet or on the front lines facilitating planning sessions, Julia translates research into actionable strategies and results. With exquisite attention to detail, she ensures the quality of our community needs assessments, market segmentation reports, benchmarking studies, environmental scans, and surveys. She continually maintains her competencies in the tools of the trade, including Tableau, Excel, Claritas MyBestSegments, and Google Looker Studio.

Work Experience

- ◆ The Ivy Group
 - ↳ Managing Director | January 2023 – Present
 - ↳ Director of Strategy & Operations | January 2021 – December 2022
 - ↳ Project Manager | June 2015 – December 2020
 - ↳ Project Specialist | June 2014 – May 2015



Representative Clients: Julia has contributed to each of the projects listed under Recent Work Experience.

Volunteer Experience

- ◆ Cultivate Charlottesville | Board of Directors | Fall 2021 – Present
- ◆ American Marketing Association Central Virginia Chapter | President | 2017 – 2019
- ◆ American Marketing Association Central Virginia Chapter | President-Elect | 2016 – 2017

Education: Haverford College | BA in Economics



Sarah Hamfeldt, Library Specialist, MLS (she/her)

Sarah has fourteen years of experience as a public librarian in a large rural/suburban library system. As an Adult Services Manager, she oversaw programming and reference services, allocating staff and budget over a service area the size of Delaware. She facilitated many community engagements, from surveys to community reads to dialogs on difficult issues. With a decade-plus background in strategic planning, she translates a library's wants and needs into an actionable plan, combining quantifiable data and a compelling narrative.

She has been the in-house library expert at Ivy Group since 2021, managing projects for library clients and serving as their primary point of contact.

Work Experience

- ◆ The Ivy Group | Library Specialist | November 2021 – Present
- ◆ Jefferson-Madison Regional Library
 - ↳ Adult Programs and Reference Services Manager | 2013 – 2021
 - ↳ Young Adult Librarian | 2007 – 2013
- ◆ Albemarle Charlottesville Historical Society | Assistant Director / Volunteer Coordinator | 2001 – 2007

Representative Clients

Sarah has worked with 11 Ivy clients, including:

- ◆ Ector County Library
- ◆ Hancock County Library System
- ◆ Northville District Library
- ◆ Fayetteville Public Library
- ◆ Hinsdale Public Library



- ◆ Oxford Public Library [In Progress]
- ◆ Topeka & Shawnee County Public Library [In Progress]

Education

- ◆ Simmons University | Master of Science, Library Science
- ◆ University of Virginia | Bachelor of Arts, History



Mark Parlette-Cariño, Copywriter, MFA (he/him)

With experience as a content writer, writing teacher, and author, Mark specializes in choosing the right words for any context. Equipped with an MFA in Creative Writing from the University of Virginia, he works closely with his colleagues to navigate the nuances of tone and voice and make each piece of writing clear, accurate, and effective.

Since joining Ivy in 2022, he has ensured the quality of its planning project deliverables by editing and refining strategic plan documents, community needs assessments, survey questionnaires, and interim reports.



Kathy Kildea, Business Manager (she/her)

With the spirit of a community organizer and an entrepreneur's mindset, Kathy brings people and things together to make the whole much, much larger than the sum of its parts. An empathetic problem-solver, her focus on planning and team coordination allows her to see the big picture without losing sight of the more granular project components. Kathy excels at wrangling dangly bits, which she attributes to her experience as a caterer and having developed eyes in the back of her head.

A former small business owner and board member of several local organizations, she is committed to ensuring smooth operations between stakeholders and providing detail-oriented, responsive support.





Denise B. Prince, MBA, MPH, Owner (she/her)

A long-time healthcare executive and entrepreneur specializing in new ventures and community innovation, Denise brings broad business management expertise to the strategic planning team. Over the last thirty years she has served on the boards of numerous local and national not for profit organizations and has led many strategic discussions and planning processes. She particularly enjoys helping organizations define their purpose, hone their business plans, and execute wisely to create value for staff, executives, and the broader community.

Denise’s guidance ensures that The Ivy Group’s strategy is rooted in both in-depth research and imaginative execution. With her experience as a leader, communicator, and decision-maker, Denise is unmatched in her ability to manage the competing priorities of different stakeholders.



Recent Work Experience

Alexandria Library (VA)	Hinsdale Public Library (IL)
Auburn Public Library (AL)	Riter C. Hulseley Public Library (TX)*
Augusta County Library (VA)	HSLC/POWER Library (PA)
Bee Cave Public Library (TX)*	Licking County Library System (OH)
Buncombe County Public Libraries (NC)	Northville District Library (MI)
Calvert Library (MD)	OHIONET
Cecil County Public Library (MD)	Oxford Public Library (MI)*
Cedar Rapids Public Library (IA)	Port Jefferson Free Library (NY)
Charles County Public Library (MD)	Reaching Across Illinois Library System (RAILS)
City of Anna (TX)	Reading Public Library (MA)
Ector County Library (TX)	Roanoke Public Library (TX)*
Fauquier Public Library (VA)	Southern Maryland Regional Library Association
Fayetteville Public Library (AR)*	Spring Lake Public Library (NJ)
Frisco Public Library (TX)	St. Mary's County Library (MD)
Hancock County Library System (MS)	Topeka & Shawnee County Public Library (KS)*
Helen Hall Library (TX)	Ypsilanti District Library (MI)
Highland Park Library (TX)	<i>*In progress</i>

We stand apart from other consultancies because we know libraries and understand their need to secure a path to sustainability and success in a fast-changing world. Since The Ivy Group's founding in 1989, we have collaborated with a variety of library organizations to develop effective strategies, plus branding, marketing, and outreach programs that address their unique challenges. We have frequently been awarded follow-up engagements related to facilities, branding, and communications plans that build upon the strategic plans.

Our library clients span the nation and include over 100 academic, special, and public libraries, as well as library agencies, state departments, and support organizations. In our thirty plus years as passionate library advocates, we have successfully navigated it all: from single location libraries to systems with dozens of branches, those concentrated in urban neighborhoods to those spread widely throughout rural counties, the well-funded to the not-so-well funded, and first-time to near-retirement Directors. The Ivy Group's diverse client portfolio contains numerous National Medal award recipients including Cedar Rapids Public Library, Cecil County Public Library, and San Antonio Public Library.





Fayetteville Public Library (AR)

1 location | 86.9 FTE | \$12.9 million budget

Community Needs Assessment Report 2022 – ivy.gr.com/FPL-report

Services: environmental scan, peer benchmarking, staff forum and survey, community leader interviews, community forums and survey, market segmentation, assessment report

In 2021, the Fayetteville Public Library completed a 103,000 square foot expansion featuring a Center for Innovation, educational labs, a teaching kitchen, and high-tech event space. With big changes to the building and a rapidly growing service area, the Library asked Ivy Group to perform a thorough Community Needs Assessment to help it identify how the Library could best meet the changing needs of community members.

Through deep community engagement, including focus groups, community forums, and an online survey, we aligned emergent needs with a sustainability model that supports funding, end-users, stakeholders, and staff. By focusing on partnerships, people, and place, the Library can chart a future which addresses the community's interconnected needs. After a successful presentation to Library leadership, Ivy has been asked back for additional engagements with FPL's Board and stakeholders in April 2023.



Hancock County Library System (MS)

5 locations | 28 FTE | \$1.98m budget

Strategic Plan FY23-27 – ivy.gr.com/HCLS-plan

Services: environmental snapshot, market segmentation, telephone survey, community leader interviews, stakeholder planning sessions, board member interviews, strategic plan development

In 2022, The Ivy Group performed strategic planning services for Hancock County Library System (HCLS). Coming out of a period of disruption, HCLS needed to deeply engage its community to inform its planning, improve equity, and strengthen its relationships. Ivy’s services included a telephone survey, to ensure we reached across the digital divide and collected input from non-users. The research, engagement, analysis, and planning led to clear targets for improving equity for the many families facing food insecurity and transportation barriers, beginning with two major initiatives: going fine-free and restoring mobile library services.

To strengthen key partnerships, community leaders were heavily involved in the planning process, attending in-person sessions for visioning, for interpreting research, and for determining goals and tactics. The strategic plan also paved the way for greater financial security, through a better relationship with funding agencies. It enabled the director to prioritize his asks and established measurable results that agencies could track to feel confident that the Library would make effective use of funds.





Hinsdale Public Library (IL)

1 location | 26.6 FTE | \$1.58m budget

Strategic Plan FY23-25 – full plan: <https://hinsdalelibrary.info/plan/> | highlights: ivy.gr.com/HPL-mailer

Services: environmental scan, board member interviews, peer benchmarking, staff forum, community leader interviews, community survey, market segmentation and community profile, strategic plan development

Hinsdale had undergone significant changes since the last strategic plan was completed 12 years before. In 2022, the community wanted more from the Library, but it wasn't clear which changes and expansions were most widely desired, nor how to best prioritize and address them. Ivy Group created a detailed, multi-layered picture of the community through surveys, interviews, and market segmentation. Through the planning process, from the initial Board interviews through the final planning session, Ivy brought staff and stakeholders together and ensured that their energy and effort was coordinated toward clear, shared targets.

The Library staff and leadership came together to make quick progress on several goals and established a timeline to prioritize and make sure changes are done with care. The research suggested that targeted marketing and outreach could promote the value of the Library to a highly-resourced population and revealed which high-touch services should be expanded to best meet the expectations of a community which loves its Library.





Northville District Library (MI)

1 location | 27.8 FTE | \$2.78 million budget

Strategic Plan FY23-25 – ivy.gr.com/NDL-plan

Services: environmental scan, peer benchmarking, board member interviews, staff forum, community leader interviews, staff survey, online and telephone community surveys, market segmentation, strategic plan development

In 2022, Northville District Library (NDL) knew its service area was growing, and it wanted details. Users were also making a growing number of requests for more programs and services. NDL selected Ivy Group to dig into these issues, which we did through research, analysis, and facilitated working sessions.

By Ivy's final presentation to the Board, NDL had already implemented several high-priority tactics. Soon after the plan's completion, the Library took two other big steps: going fine free and commencing a big weeding project to expand collections based on user input. Before the end of the year, the Library set up a committee to make decisions about expanding hours. Last and certainly not least, leadership got busy filling out the framework for priority setting. While eager to make progress, the Library is determined above all to enact changes in the most thoughtful and sustainable way.



References

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Methodology

Ivy Group understands NPL’s desire to push the Library forward and respond to pandemic-related changes in ways that make the greatest impact possible. We start by asking the tough questions—what does the public think of NPL? What changes would they like to see? How aware are they of current services and programs? Do they have a wish list? What do they like best and least?

We will engage key stakeholders, staff, and leadership to develop an actionable plan with research-backed strategic priorities that chart the future course of Library offerings. We prioritize capturing perspectives from across various community groups to create a plan that improves standards for programs, collections, and services that are fiscally responsible and culturally responsive.

Discovery

Project Kickoff

Say hello, everyone! To establish a common understanding, Ivy Group will facilitate a preliminary conference call with NPL. During this introductory meeting with the Strategic Planning Committee, we’ll introduce the teams and review objectives, deliverables, responsibilities, and scheduling.

Community Profile

The consulting team will perform a comprehensive analysis of the community, using the 2020 Census, comprehensive planning reports, GIS mapping technologies, PolicyMap visualizations, and other studies, statistics, and reports that will inform the project.

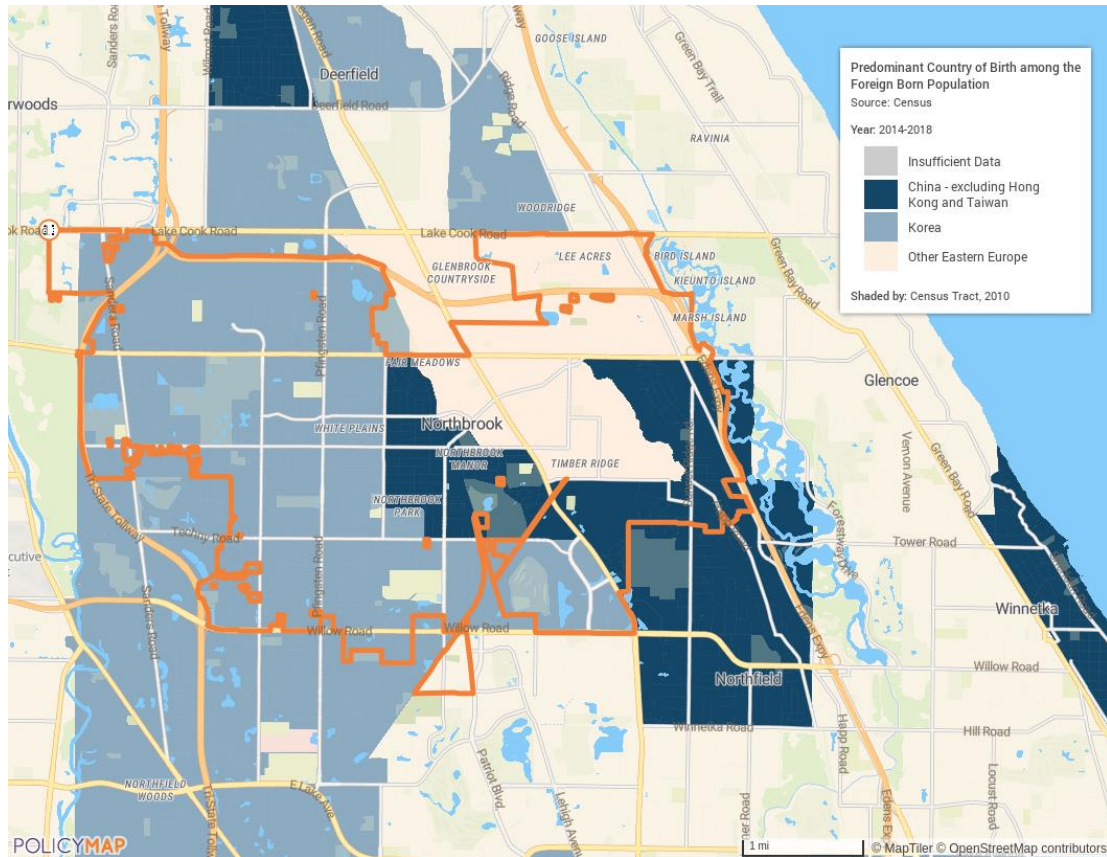


We ask the Library to provide relevant documents and data for us to review, such as gated local planning, economic development, sustainability, and other key municipal reports.

We will independently access and review:

- ◆ Relevant school district reports and educational statistics
- ◆ Publicly available local planning and regional forecasting documents
- ◆ Census and other local demographic reports

Deliverable: Summary memo [PDF] with executive summary of themes



Foreign-born residents' countries of birth, by Census track in Northbrook, Illinois (PolicyMap)

Library Environment Assessment

The consulting team will evaluate the Library's strengths and weaknesses, quality of services, reputation, management, budget, and organizational health.

We ask the Library to provide relevant documents and data for us to review, such as:

- ◆ Previous NPL survey data and reports



- ◆ The Library's EDI After Action Report and research

We will independently access and review:

- ◆ Publicly available Library documents such as board meeting minutes, budgets, and newsletters
- ◆ State and national benchmarking statistics
- ◆ National reports, surveys, and studies regarding public library service and information technology

Deliverable: Insights from this assessment will be included in the final strategic plan.

Board Member Interviews [Optional]

We will conduct one-on-one, in-depth phone interviews with up to seven Board members by phone or Zoom.

These confidential conversations provide opportunities for our consultants to better understand the PEST (political, environmental, social, and technological) context of a project, and for Trustees to express, without reservation, their views on the Library's organizational health and prospects.

Interview notes will be prepared to serve as a reference throughout the project and will be kept confidential to the consulting team.

Deliverable: Summary memo [PDF] with executive summary of themes

Planning Session | In-person, Visit #1

We will meet with the Director and tour the Library with attention to relevant areas of operations, such as collections, staffing, technology assets and capabilities, organizational health, etc.

During a half day workshop, the consultants will conduct the following sessions with the Strategic Planning Committee:

- ◆ **Process Makes Perfect** – Reviewing the planning process sets the group's expectations and establishes a common understanding of how a research-based strategic plan supports library success.
- ◆ **Where's the Need?** – We'll identify internal perceptions of areas of community needs (e.g., EDI, mental health care, cultural enrichment, healthy environments, etc.) and discuss how the Library can make positive changes to address those needs.



- ◆ **Library Innovations** – We'll report on inspirational case studies and facilitate discussions around how the Library might proactively respond to social, economic, technological, demographic, and cultural shifts.
- ◆ **SOAR Workshop** – A SOAR (Strengths, Opportunities, Aspirations, and Results) analysis of the Library is a valuable exercise for identifying and prioritizing key considerations.



Community Assessment

Community Conversations | In-person, Visit #1 [Optional]

Get the right people together; they'll tell you what they think! Community conversations publicize the strategic planning process and signal that the planning process is open and inclusive by enabling individuals for whom other research initiatives present access barriers to have their voices heard. They are effective for obtaining useful anecdotal information, engaging community groups in talking about what's important to them, and informing the Library about perceptions of new services. Insights can guide the development of the survey questionnaire, and particularly compelling comments can be woven into the strategic plan.

Ivy Group will go to the people by facilitating six engagements at off-site locations. The welcoming, accessible off-site locations will be chosen in consultation with the Library to take this service to residents and ensure representation from immigrants, those with transportation and time constraints, and those who are not currently Library users. In consultation with the Strategic Planning Committee, we'll divide six sessions between community meetings, open to all, and invitation-only focus groups.

Ivy Group will be responsible for:

- ◆ Consulting with the Library to select appropriate venues
- ◆ Making recommendations regarding how to promote attendance
- ◆ Developing customized discussion guides and exercises
- ◆ Facilitating the discussions and exercises
- ◆ Preparing an executive summary of findings
- ◆ Integrating key findings into subsequent research and, ultimately, the new strategic plan

The Library will be responsible for:

- ◆ Publicizing the meetings
- ◆ Handling logistics, including securing venues for the discussions and providing refreshments and honoraria

Deliverable: Summary memo [PDF] of key themes



Community Leader Interviews

Community leader interviews provide the Library with an opportunity for substantive conversations with individuals who represent key stakeholder groups in the Library's service area and can "make things happen" when support is needed.

It is our experience that having the Library, e.g., trustees and managers, rather than outside consultants, conduct the interviews makes it possible for the Library to connect personally with individuals to cultivate important relationships.

These interviews also enable the Library to:

- ◆ Better understand its service area's overall needs, leadership priorities, as well as the social, political, economic, and demographic trends affecting it
- ◆ Assess the awareness of and support for library services among critical constituencies
- ◆ Identify opportunities for the Library to align itself with local goals in such areas as educational achievement, economic development, inter-departmental cooperation, customer service, etc.
- ◆ Evaluate the potential for new collaborations and partnerships

Ivy Group will be responsible for:

- ◆ Coaching the Library on the interviewing process
- ◆ Consulting with the Library on developing a list of "influentials" who should be interviewed (educators, employers and business owners, civic, cultural, and religious leaders, elected officials, journalists, etc.)
- ◆ Creating a discussion guide (one round of revisions) to guide the conversations
- ◆ Reviewing submitted reports and analyzing participant feedback
- ◆ Preparing an executive summary of findings

The Library will be responsible for:

- ◆ Contacting leaders and conducting approximately ten interviews
- ◆ Submitting interview summary reports on forms the consultants will provide

Deliverable: Summary memo [PDF] of key themes

The Ivy Group is available to conduct the interviews if the Library would prefer; costs will be provided upon request.



Community Online Survey

Conducting an online survey of the public is a cost-effective way to give voice to anyone who wishes to participate in the research process, and it sends the message that the study is inclusive, unbiased, and transparent. Most importantly, it can become the occasion for raising overall public awareness and understanding of the wide array of library services. Because 94% of Northbrook residents have access to broadband internet service at home, well above the state and national rates of 87%, the online survey is an equitable method to reach the majority of households.

We will work closely with the Strategic Planning Committee to develop a personalized questionnaire that dives into the wants and needs of the community to determine the:

- ◆ Importance that residents attach to specific library programs and services
- ◆ Levels of customer satisfaction (users only) with specific attributes of library services (facility, programming, collections, technology access, customer service, etc.)
- ◆ Access and technology-related barriers that prevent some residents from utilizing library services
- ◆ Interest in new programs, services, and technologies that the Library would consider offering in the future

Ivy Group will be responsible for:

- ◆ Developing the survey questionnaire (two rounds of revisions) with a series of quantitative questions and one qualitative “open ended” question
- ◆ Recommending strategies to ensure maximum participation
- ◆ Developing, testing, and launching the survey, and monitoring response rates
- ◆ Analyzing the data
- ◆ Summarizing key findings

The Library will be responsible for:

- ◆ Posting the survey link on its website and social media
- ◆ Promoting survey participation

Deliverable: Survey report [PDF] and data tables

Market Segmentation

Claritas MyBestSegments defines every household in the U.S. by distinct lifestyle types, called “segments,” to provide a comprehensive picture of residents. By identifying key demographics, lifestyle characteristics, consumer behavior, and media preferences of



community residents, the Library can determine not only whom to target but also what to offer and how to reach them.

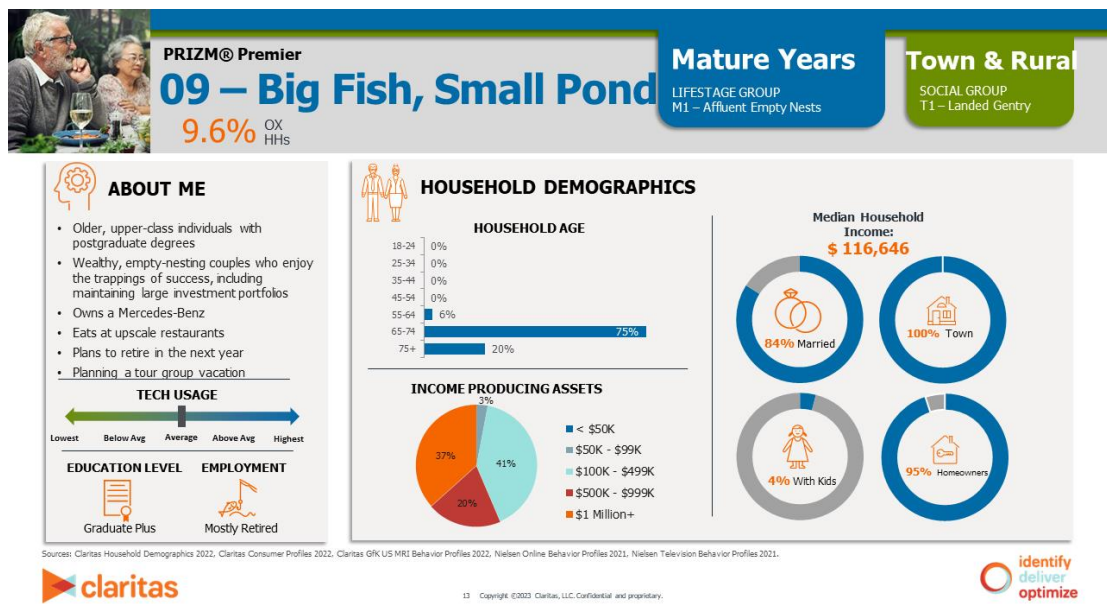
Provided with a list of cardholder addresses (no names appended,) we will identify the Library’s primary consumer segments. We’ll then calculate the Library’s penetration of the service area (and count the number of non-user households) by comparing the consumer segments of library users to the segments that make up the community overall. Finally, we will map user households by segment, an exercise that is particularly useful for targeting marketing efforts and evaluating potential sites for outreach, such as bookmobile stops.

Key takeaways from a market segmentation study include:

- ◆ Assessment of the share of community households reached by the Library
- ◆ Comparison of how library users differ from non-users (e.g., are library users more or less likely to have children than non-users?)
- ◆ Identification of non-user households by segment
- ◆ Recommendations for how to better engage specific segments within the community with relevant services, programs, collections, and outreach
- ◆ Distribution of patron households by segment and household demographics (e.g., maps showing clusters of patrons with low technology use)

Deliverable: Market segmentation report [PDF]

Claritas output data is proprietary; The Ivy Group’s license agreement does not allow for sharing raw data. Summary data will be provided as the license allows.



Strategic Plan Development

Implementation Workshop | In-person, Visit #2

The day will begin with a dive into the data with NPL's Strategic Planning Committee and internal stakeholders to establish areas of focus for the strategic plan. In the afternoon, staff will work in small groups to outline clearly defined, measurable goals, and objectives.

We envision a half day for each session with scheduling to be arranged in collaboration with NPL.

Morning Session: Data Dive with Leadership & Strategic Planning Committee

Smaller is better when digesting the data and identifying service priorities and high-level strategies. We will facilitate the following sessions with a nimble group of Board, staff, and other stakeholders designated by NPL:

- ◆ **Research Says What?** – A packet containing all research reports will be provided to session participants beforehand. As a group, we'll review the research takeaways, compare findings to current Library offerings, and incorporate the community's priorities.
- ◆ **Focus on Strategy** – Together, we'll identify emerging themes from the research, reach consensus on areas of focus, and outline supporting strategies.

Afternoon Session: Work Groups

Stakeholder engagement and excitement are key to the plan's success. The closer staff are to the planning process, the more likely they are to actively support and promote plan priorities. Together, staff teams will share their understanding of the landscape and brainstorm solutions informed by their experiences. To add more perspectives, including those from outside the Library, NPL may also wish to invite selected community representatives, as determined by the Strategic Planning Committee.

Each area of focus that emerges from the data dive will be assigned to a work group whose purpose will be to build an actionable plan. Work groups address the nitty-gritty of goal setting, implementation, and progress assessment. To guide this effort, we will facilitate the following activities:

- ◆ **Research Overview** – We will provide an executive summary outlining key takeaways from the research for staff to review prior to the workshop and templates for building the strategic plan.



- ◆ **Roundtables**– The groups will be divided by area of focus to work on goal setting, implementation tactics, and progress assessment. We will be readily available to advise the groups as they proceed, and to review the draft plans as they are created.
- ◆ **Messaging Matters** – We'll examine the Library's current mission, vision, and core values statements and determine the extent to which they are still relevant. We'll also conduct a visioning exercise to guide planning and decision making.

In the weeks following the implementation workshop, the consulting team will make an online form available to staff to collect additional ideas, feedback, and planning considerations.

Strategic Plan

We will draft the new strategic plan based on the areas of focus that emerge from the research and the draft plans submitted by the work groups. An implementation dashboard will be used to define responsibilities and track measurements in response to changes in the economic, demographic, and political climates.

Elements of the strategic plan:

- ◆ Executive summary
- ◆ Project methodology
- ◆ Revised Library mission, vision, and values statements
- ◆ Priorities, goals, objectives, and activities
- ◆ Acknowledgments
- ◆ Appendices of research reports

The implementation dashboard will:

- ◆ Assign staff leads and action teams for each area of focus
- ◆ Identify resources required to address service priorities
- ◆ Set goals and success measurements for key outcomes
- ◆ Establish deadlines for specific strategies and track progress toward completion
- ◆ Allow for regular adjustments during the plan's lifespan
- ◆ Facilitate accountability updates to the Library Board and other stakeholders

We will submit a draft plan for feedback and suggested revisions. Following the incorporation of two rounds of revisions to the document, we will submit the approved and formatted plan to the Library. We will also consult with the Library on the best ways to communicate results of the planning process to the public and to key stakeholder groups.



Plan Presentation | Virtual [Optional]

During a virtual meeting, we will formally present the final strategic plan to the Library Board of Trustees, stakeholders, and community partners designated by the Library.



Timeline

The process we have proposed generally takes six to seven months to complete, depending on options selected; suggested timing is as follows:

TASK	START	END	7/3	7/10	7/17	7/24	7/31	8/7	8/14	8/21	8/28	9/4	9/11	9/18	9/25	10/2	10/9	10/16	10/23	10/30	11/6	11/13	11/20	11/27	12/4	12/11	12/18	12/25	1/1	1/8	1/15	1/22	1/29					
Discovery	Project Kickoff & Community Profile	7/3/23	7/23/23	█																																		
	Library Environment Assessment	7/10/23	8/6/23		█																																	
	Board Interviews [Optional]	7/10/23	8/13/23		█																																	
	Planning Session Visit #1	8/14/23	8/27/23						█																													
Community Assessment	Community Conversations [Optional] Visit #1	8/14/23	8/27/23					█																														
	Community Leader Interviews	8/28/23	10/8/23							█																												
	Online Survey	9/4/23	11/5/23									█																										
	Market Segmentation	9/11/23	11/12/23										█																									
Planning	Implementation Workshop Visit #2	11/13/23	11/19/23																				█															
	Plan Development	11/20/23	1/28/24																					█														
	Final Presentation [Optional]	1/22/24	2/4/24																																█			

Schedule of Costs

This proposal reflects our current understanding of NPL’s needs. We welcome the opportunity to discuss an alternative constellation of services.

*Costs for data gathering and analysis (community research component)

Core Services Sub-total | \$43,991 Excludes optional services and travel expenses

Kickoff + Community Profile*	3,875.
Library Environment Assessment	3,875.
Planning Session Visit #1	5,170.
Community Leader Interviews*	1,240.
Community Online Survey*	6,200.
Market Segmentation* Includes est. \$2,200 in vendor fees for creating custom community profile and coding up to 22,000 patron records	8,386.
Implementation Workshop Visit #2	6,720.
Plan Development	8,525.

Optional Services

Board Member Interviews*	3,875.
Community Conversations* Visit #1	7,750.
Final Presentation Virtual	1,550.



Travel Expenses Billed as incurred

Site Visit #1 2 consultants, 1 day, 2 nights	Est. 1,880.
Site Visit #1 with optional Community Conversations 2 consultants, 3 days, 4 nights	Est. 2,960.
Site Visit #2 2 consultants, 1 day, 2 nights	Est. 1,880.

NPL may be asked to provide up to \$75 worth of supplies for facilitated sessions, e.g., sticky easel pads, Post-its, markers. If NPL wishes to offer honoraria for focus group participation, those costs will be incurred directly by the library.



Terms

This Service Agreement (this “Agreement”) is made by and between The Ivy Group, Ltd. (“The Ivy Group”) and Northbrook Public Library (the “Client”).

Scope of Work

The Ivy Group will provide the Client with a proposal (the “Proposal”), which is incorporated herein by reference. The Proposal will set forth the scope of work that The Ivy Group will perform on behalf of the Client (the “Project”).

This quotation is valid for 90 days from the date submitted.

Invoicing

The Client agrees to pay a flat fee of \$_____ (the “Flat Fee”) for The Ivy Group’s work on the Project to be paid as a non-refundable deposit and 5 subsequent monthly installments (6 total equal installments of \$_____). The deposit is due upon agreement to proceed.

Projects canceled by the Client after work has begun will incur an early termination fee in the amount of 25% of the Flat Fee. In addition to the Flat Fee, the Client may be responsible for additional fees and costs, as set forth below.

Out-of-Pocket Expenses

The Client agrees to reimburse The Ivy Group for all approved costs advanced or incurred on the Client’s behalf. Media, printing, photography, and other purchases will be billed at the industry standard of 17.65% over net (15% margin). The Client agrees to pay for The Ivy Group’s travel time and expenses in connection with the Project, including the current allowable IRS rate for mileage. Travel time will be billed at a rate of \$75/hour per person.

Payments

All payments for services are due net-30 and out-of-pocket expenses are due net-15. Payments to The Ivy Group may be made by ACH, business check, or credit card; credit card payments will incur a 3% processing fee.

Project Timeline

Upon the Client’s acceptance of the Proposal, the Client and The Ivy Group will determine a mutually agreeable timeline for specified deliverables. The Ivy Group requests a minimum of five (5) business days from receipt of the signed Proposal to commence work on the Project.

Revisions / Additional Services

The Ivy Group and the Client may agree to revise the scope of the Project. If the scope of the Project is revised, the Client may incur additional charges. Additional services will be billed in half hour increments at the hourly rates set forth below, or at an additional flat fee to be agreed upon by The Ivy Group and the Client. Changes to the Project’s creative parameters also may alter the Flat Fee.

Consultant	155 /hr
Creative	135 /hr
Developer	175 /hr

The Ivy Group requests a minimum of five (5) business days from receipt of the Client’s approval of all revisions to begin work on such revisions.

File Licensing

Upon payment of all fees, The Ivy Group will grant to the Client a non-exclusive non-transferable license to use, reuse, publish, reproduce, distribute, transmit, parse, modify, copy, and translate into any language the final deliverable product that is the subject of this Proposal; provided, however, that the license to use fonts,



Photoshop, and InDesign files shall be limited to their use as a part of the deliverables provided by The Ivy Group to the Client, pursuant to this Agreement.

Specifically excluded from this license is all intellectual property owned or licensed by The Ivy Group leading to the creation of the final deliverable product, including source files. Also excluded from this license is all intellectual property owned by The Ivy Group prior to beginning or outside of its work on the Project. This intellectual property shall remain the exclusive property of The Ivy Group.

Photography rights will be negotiated on a photo-by-photo basis and may be purchased for specific use, but otherwise remain the property of the photographer unless otherwise agreed upon in advance.

Unless the deliverable is defined as a "template", the submission of any working design files will incur a source licensing fee of 25% of the project deliverable cost.

If the Client wishes to negotiate different license terms or the ownership of the final deliverable product, it must do so prior to the time that The Ivy Group begins work on the Project. Any license or ownership agreement containing different terms than those stated herein must be in writing and signed by both The Ivy Group and the Client.

The Ivy Group may request that its name and image be removed from a final work product that does not substantially reflect the original draft submitted.

Indemnity

The Client and its successors and assigns shall defend, indemnify, and hold harmless The Ivy Group and its employees, agents, successors, and assigns from any claims, actions, losses, damages, liabilities, costs, and demands arising out of or related to the Project or the Client's business, except if due to The Ivy Group's negligence or breach of agreement.

Choice of Law, Venue, Interest, Attorney's Fees, and Costs

The Client and The Ivy Group agree that this Agreement is governed by the laws of the Commonwealth of Virginia. The proper venue for any dispute arising out of this Agreement shall be the federal or state courts sitting in the County of Albemarle, Virginia and the City of Charlottesville, Virginia. The Ivy Group reserves the right to assess finance charges against the Client at the rate of 18% per annum on any unpaid balance. The Client agrees to pay all costs, including, but not limited to, court costs and reasonable attorneys' fees, incurred in an attempt to collect any unpaid balance and related to any action to enforce the terms of this Agreement.

Termination

The Ivy Group reserves the right to terminate this Agreement at any time for any reason including, but not limited to, nonpayment.

THE FOREGOING IS AGREED TO AND ACCEPTED:

(Signature) Northbrook Public Library

(Signature) The Ivy Group, Ltd.

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____





Strategic Planning Consulting Services

Northbrook Public Library
Northbrook, IL

Prepared by ReThinking Libraries
April 10, 2023

April 10, 2023

Kate Hall
Executive Director
Northbrook Public Library
khall@northbrook.info

Kate,

ReThinking Libraries is pleased to submit a proposal for consulting services to assist in the development of a *Strategic Plan* for the Northbrook Public Library (NPL). Our full-service team is well-positioned to help NPL develop a new plan worthy of its very diverse community through a process that seeks to elevate the voices and ideas of everyone in that community. Over the past several years, our team has developed a successful and efficient way to plan with libraries. Instead of strict adherence to a fixed methodology, we work with each client to tailor the planning tools and processes to best fit each library and its community. We focus on the overarching goal of creating a strategic plan that can allow the library to adapt and react to today's quickly shifting world and varied needs of a diverse community.

Regardless of the overall methodology settled upon, our work typically includes the following activities:

- Collection and library data analysis
- Direct input from a diverse array of community members and stakeholders (users and non-users), staff, and board members with a focus on aspirational input over problem-focused input.
- Mapped demographic analysis
- A comparison benchmark report (with multiple comparison cohorts including state, regional, national, and aspirational)
- Discussion of best practices of future-ready ready libraries as a part of the stakeholder input process and strategic retreat

As noted in the Scope of Work, we will incorporate your work from EDI After Action Report from the Blackberry Collection and the quantitative work from Lily Zheng, into your strategic plan. Additionally focus will be placed on sustainability and how it applies to the future strategic direction of the library.

All findings are synthesized, and goals and strategies are collaboratively developed to successfully guide Northbrook Public Library into the future. The final deliverable provides NPL with a process to keep its strategic plan living, breathing, and updated throughout its lifetime.

This proposal is firm and irrevocable for 90 days. We look forward to the opportunity to respond to questions and further explain our process as needed. Please don't hesitate to contact us with any questions.

Best regards,



Rob Cullin
Managing Principal
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Carmel, IN 46032
317-509-3268 rob@rethinkinglibraries.org

Executive Summary

The Northbrook Public Library's (NPL) leadership has expressed interest in consulting services to assist with the creation of its next strategic plan. ReThinking Libraries (RTL) is pleased to submit a proposal for partnering with NPL on this important project. It is understood that NPL is embarking on this process to develop a plan to guide decision-making over the next several years. It will define the role of the Library and governance by the Library Board of Trustees and will also serve as a framework for setting Library vision, goals, and creating a service plan. The plan will reflect the needs and realities of the Library, align with the overall needs of the Northbrook Public Library's community, and help elevate the role of the Library to a higher level of service.

This is intended to be a highly collaborative process incorporating extensive input from Library leadership, Library Trustees, Friends of the Library, community leaders, and residents. Input will be gathered using a variety of means as determined by the consultant and the Library Strategic Planning Team. It is intended to engage both users and non-users of the library. We will work with the library to determine the best approach and balance between in-person and virtual engagement for its community. Every effort will be made to conduct this process in an inclusive manner allowing broad and diverse participation from across all segments of the community.

The RTL team views its role in this project as facilitator and collaborator. We don't make decisions for you; we help you make the best decisions about your Library's present and future. We will analyze information and offer professional recommendations based on observation, stakeholder feedback, demographics, and assessment of Northbrook Public Library's existing services, facility, and community. We will also facilitate staff and board strategy planning meetings to help the team find the right strategic vision for your community's library. RTL will work with the NPL team, prior to the formation of the plan, to benchmark and evaluate library practices, staffing, efficiencies, etc. Once the plan has been created, RTL will also be available to NPL to offer best practices for measuring progress as the plan is implemented.

Of key importance to a project such as this is the quality of the communication and collaboration between RTL and NPL's Strategic Planning Team. As your consultants, we must effectively share analyses and opinions, so all stakeholders can fully understand the implications of decisions that may be made. In turn, the Strategic Planning Team must help RTL fully understand the local context related to any resulting choices. Timely responses in providing requested information and replies will help to keep the project on schedule and all participants fully engaged.

The Strategic Planning Team members will actively participate in the creation of the *Strategic Plan* so they are fully invested in the process and the final product. It is essential all involved have a clear vision of what needs to be done based on the in-depth assessment of the existing situation, the consideration of new and emerging trends in library services, and an understanding of local realities and sensibilities. Included will be training on processes allowing for the ongoing evaluation of progress toward the established goals and the understanding and confidence to develop new strategies as the plan evolves.

Organizational Information: Company/Consultant

In 2004 Rob Cullin helped Kimberly Bolan start Kimberly Bolan & Associates, a national library consulting firm based outside Indianapolis (IN). Once Kim returned to work as a library administrator, Rob continued his work in library consulting. Janet Nelson joined Rob in 2019 and they relaunched the business as ReThinking Libraries in 2020. Over the past 18 years, the RTL Team has been involved in numerous facilities projects, strategic plans, building programs, and other work with hundreds of libraries across the US. Clients range from small rural public libraries to large urban facilities, and everything in between. The RTL Team focuses on helping public libraries improve their operations and better serve their constituents. Our team is passionate about understanding what it takes to be a successful and thriving future-ready library.

For this project, RTL's team will be led by Managing Principal, Rob Cullin though just as actively involved will be Principal/Senior Consultant, Janet Nelson, and/or Randy Maxey, Senior Consultant, and/or Kathy Stewart, Senior Consultant. Ivonne Smith will be joining our team as a native Spanish speaker and consultant on this project. Together Rob and Janet will be responsible for the coordination of all onsite and offsite work, managing the project communications and timelines, and coordinating all deliverables. We may partner with other RTL Associates and will include them in the project as needed, but the bulk of the work performed is done by us.

Rob Cullin helped launch Kimberly Bolan & Associates in November 2004 which evolved into ReThinking Libraries in 2020. Rob's primary involvement with KBA began in 2005 when he and Kim co-authored *Technology Made Simple* and began writing and presenting together across the United States. Since then, Rob has been involved in many of KBA/RTL's strategic and facility planning projects. Through his previous work as President and Co-Founder of Evanced Solutions, LLC (later acquired by Demco, Inc.) he was involved with thousands of libraries across the USA, Canada, and Australia. With a broad set of experiences reaching beyond libraries, Rob has direct specialties in strategic planning, community engagement, complex data and demographic analysis, marketing, service, and organizational design. He was also named a *Library Journal* "Mover & Shaker" in 2008.

Janet Nelson co-founded ReThinking Libraries with Rob Cullin in 2020. She has over 20 years of experience in the education market, 17 of those years with Demco, Inc. Starting as a Furniture Product Manager, she moved into a variety of more strategic roles during her tenure with Demco. Her focus has always been directed toward helping librarians and library staff to better serve their communities. Janet began collaborating with Kimberly Bolan on teen library spaces through Demco Library Interiors in 2006 and over time, that evolved into more comprehensive projects and shared speaking engagements on library trends. Additional projects at Demco involved engaging with industry partners and library leaders/staff to better understand and create dialog around the immediate and future needs of libraries. She began working with Rob on library consulting in 2019. Her specific areas of expertise include strategic planning, marketing strategy, research and development, and space planning.

Randy Maxey was an addition to the ReThinking Libraries team in 2022. He is a library strategist who has focused on improving library user experience and library staff workflow. He has held multiple roles with vendors serving the library market over the past 13 years, most recently as Vice President of Partner Sales at Bibliotheca. Over his career, he has developed expertise in deploying technology to improve processes and experiences utilizing data, devices, and content. In his positions with Bibliotheca, Demco, and EBSCO/NoveList, Randy has had the opportunity to work with hundreds of libraries across North America and partners worldwide giving him an in-depth understanding of library needs and operations and an opportunity to identify creative solutions to complex challenges. Specific areas of expertise include strategic planning, technology planning, marketing, and research and development.

Kathy Stewart recently joined the ReThinking Libraries team. During her more than 20 years of experience working with libraries in North America, Canada, and Australia, Kathy has helped libraries with the work they do every day to transform patrons' lives. Kathy has drawn from her librarian role with Richland Library, first as a children's librarian, then as a branch manager, to discover libraries' priorities in her roles with library-focused vendors. Most recently she was an Account Executive with Bibliotheca. Prior to that, during her time with EBSCO's NoveList and later with Patron Point, Kathy assisted libraries by providing user-facing content, delivering training and webinars for libraries as they furthered their own readers' advisory and marketing initiatives. Kathy values building library communities and forums for libraries to learn from each other. **Kathy's areas of expertise include community engagement and marketing.**

Our Strategic Planning Experience

Strategic planning is a primary service offered by RTL, and Rob has led over 60 public library strategic plans in the past 8 years. Janet has been involved in developing over 30 strategic plans in her tenure with the organization. Our services are differentiated by our custom approach that is adapted to the needs of each client. The process evolves throughout the course of the project to achieve the best results. Our approach can be very basic for libraries that are new to strategic planning or quite advanced for those pushing for more cutting-edge approaches to library service.

The team has been involved in strategic planning for a multitude of organizations since 1996. Our work has taken place with libraries, library associations, non-profit organizations, and small and large for-profit businesses. We have been facilitators, analysts, executives, team leaders, and team members in plan development. Since 2014 alone, RTL team members have worked with over 110 different library organizations; conducted over 1,000 community engagement sessions with over 9,000 attendees; and conducted over 100 online surveys with over 30,000 participants. We don't just plan community engagement with our clients, we help them successfully get community members and staff engaged in the process.

Throughout these experiences, as well as Rob and Janet's previous business experiences, they have worked with a variety of strategic planning methodologies, approaches, and styles. This variety has enabled them to utilize many different approaches in addressing planning for various types of organizations, communities, and organizational cultures.

A sampling of the recent Strategic Plans and Community Assessments facilitated:

- Glencoe Public Library (IL) – (2022-2023) – Strategic Planning
- Pike County Public Library (IN) – (2017 and 2022-2023) – Strategic Planning and Facility Assessment
- Sun Prairie Public Library (WI) – (2022) – [Strategic Planning](#)
- Sterling Heights Public Library – (2022) -- Strategic Planning
- New Providence Memorial Library – (2022) -- Strategic Planning
- Mount Prospect Public Library (IL) – (2021-2022) – [Strategic Planning](#)
- Newburgh-Chandler Public Library (IN) – (2021) – [Strategic Planning](#)
- Fulton County Public Library (IN) – (2021-2022) -- Strategic Planning
- Charlotte Mecklenburg Library (NC) – (2020-2021) – Facility Master Planning
- Handley Regional Library (VA) – (2019-2020) – Facility Master Planning
- West Haven Library (CT) – (2020-2021) – [Strategic Planning and Efficiency Study](#)
- Adrian District Library (MI) – (2020-2021) – [Strategic Planning](#) and Facility Planning
- Saline District Library (MI) – (2020-2021) – [Strategic Planning](#)
- Catawba County Public Library (NC) – (2019-2020) – [Strategic](#) and Master Facilities Planning
- Waverly Public Library (IA) – (2018 and 2020) – [Strategic Planning](#) and Facility Assessment
- Cedar Falls Public Library (Cedar Falls, IA) – (2020) – Strategic Planning
- Liberty Lake Public Library (WA) – (2019) – [Strategic and Facility Planning](#)
- Alexandrian Public Library (IN) – (2019) – Strategic Planning

For all of these clients and the many others not listed here, we worked to determine the approach and methodologies to provide each library with the best results and fit within their allotted budgets.

Underlined projects above are hyperlinks to sample project reports. Additional samples can be made available upon request.

Our Philosophy and Project Approach

RTL believes that every community is different, which means that every library is different. What works in one community may not work in another (even nearby) community. Our approach to library planning and assessment is based on collaboration, open communication, and showing stakeholders “the possibilities” for their Library. It is also about identifying what stakeholders and members of the community want and need from their Library in terms of services and spaces. Understanding the community and the Library is at the center of our process.

At a core level, RTL is not married to a single philosophy or methodology of strategic planning. A variety of different approaches and tool sets can help any organization arrive at a solid plan. Throughout our professional work, we have been exposed to and worked with many philosophies, processes, and tools and, if selected, we will work with your team to determine what tools and methodologies best fit your community and your library.

All that being said, RTL does have two overriding philosophies that drive our vision for successful and dynamic strategic planning for future-ready libraries:

1. Robust community input from library users, non-users, community leaders, staff, and board members based on aspirational discussions instead of problem-focused dialogue. Though we don't formally call this Appreciative Inquiry, many of the premises and approaches are similar.
2. A final plan that is dynamic and easy to “live.” The plan must maintain a certain level of flexibility, while still being measurable, to address the shifting landscape facing today's public libraries.

Our methodology centers on the previously mentioned philosophies and helps organizations build both a strategic framework and a more strategic-minded culture. We incorporate research and analysis of existing data with direct staff and user input gathered through community engagement sessions, online surveys, and one-on-one discussions. Typically, RTL's process leads to a 2-6-page high-level plan that encompasses the top levels of strategy for the full-time frame of the plan. Once finalized RTL works with the library leadership to develop a separate annual work plan which focuses on the operational level with the details and tactics of the plan based on a 12-month timeline. This work plan development is repeated each year, developing the next 12-month detailed plan.

A big strength of this process is its inherent design around feedback. As you live the plan, the process helps you constantly evaluate your library against what is planned and, when necessary, allows for changes and adjustments to be made. No plan can predict the future. The best plan and process is one that accepts this fact and builds evolution into the process, while still maintaining a discipline holding to the higher mission and vision of the library and the community.

Regardless of the process and tools chosen for your project, RTL's overall goal for strategic planning is to encourage our clients to think and innovate. We are interested in motivating libraries to move to the next level. We want our clients to end up with a concise plan they can live and breathe, not just file with their state agency and/or stick in a drawer. Our role is not to develop the “consultants' plan” or the “staff and board's plan” for NPL. Rather, our responsibility is to help NPL educate its public, generate ideas and solutions, and develop a plan that reflects its community members and the future.

Public libraries in the 21st century, regardless of size and budget, can thrive and become the center of their community, providing valuable services and facilities for residents of all ages. Focused and visionary planning is the only way libraries can continue to be successful within the confines of limited human and fiscal resources. The result is an improved library that effectively delivers services targeted to the community's expectations and compatible with the library's overall vision, mission, and goals.

Work Plan

ReThinking Libraries takes a holistic view of planning. We incorporate library usage data, local demographic information, multiple forms of community input, and benchmarking data to develop a plan seeking to understand past history but focusing on future aspirations and the initiatives and activities needed to achieve the vision. Our expertise in community engagement is a strength and we help libraries maximize community participation during the input phase. Since we work nationally, we are adept at navigating the requirements of different library governance structures and are familiar with the wide variety of funding models characteristic of public libraries. We are well-versed in the trends impacting today's libraries and have practical experience that can be applied to a variety of different situations.

Our own processes have been tested over recent years, but we have successfully adapted and are now adept in conducting planning activities in virtual, hybrid, or in-person environments based on health requirements and client desires. We have also had opportunities to dig more deeply into some pressing concerns including diversity, equity and inclusion, homelessness and poverty, sustainability, and other issues that are important to libraries collectively and to specific communities. These new approaches have resulted in more engaged participation by both organizations and individuals and plans that more deeply address some of the core issues making libraries vital to their communities.

The events of the past few years have also made it clear that it is virtually impossible to predict the future and therefore critical that organizational culture, plans, and processes are designed in a way that are flexible and can adapt rather than collapse under pressure. The nimble approach we encourage has helped our clients modify their approaches and move their libraries forward, even when their expected plans and outcomes change.

As part of a typical strategic planning process, RTL will:

1. **Conduct a kick-off meeting and establish a timeline:** discuss the process and define initial elements such as NPL Strategic Planning Team introductions, timeline, Library data requirements, community engagement methods, etc. The timeline will become more detailed as expectations are more clearly defined and schedules are developed. Depending upon scope, time of year, and library resource availability; plans typically take 4-7 months to complete.
2. **Review and analyze data and information** gathered throughout this process and work with the Strategic Planning Team, discussing what it means to be a successful and thriving future-ready library and how that translates to the planning process. The Benchmarks, Demographics, Collection Analysis and Technology Assessments are all started and often completed during this stage, leaving room for learnings along the way to drive adjustments in these assessments.
3. **Gather and analyze stakeholder input** from the community (users and non-users), staff, board members, etc. via community stakeholder discussion sessions and surveys. Working with the NPL Marketing team is essential in promoting both the community discussion sessions and the surveys through multiple channels.
 - a. Our typical approach for a library of NPL's size involves conducting about 8-12 stakeholder sessions. RTL will work with NPL leadership to develop the right approach to community input and engagement that works best for your library and community. RTL can offer some sessions in Spanish (executed as bilingual Spanish/English sessions) as an option. Other languages can be accommodated with the support of the library, if needed.

- b. The format of sessions is generally as follows but will be tailored to your specific needs. These descriptions provide a sense of the scope of community input we will want to achieve, if possible, based on local guidance surrounding public health restraints.
 - i. Targeted Groups: 7-10 Total (Staff (3-5), Board (1 including Director), and targeted representative members of the public who are personally invited to the sessions).
 - ii. PLUS, at least one or two (1-2) Open All-Community Session.
 - iii. The content for these sessions can be the same or may be focused on particular topics essential to the community. Even when the overall discussion framework is the same, RTL tailors the conversations based on the experiences, life stages, and discussion interests of those in attendance.
 - iv. The targeted sessions may involve reaching out to specific groups (e.g., parents, seniors, educators, or community leaders) whereas the open forum is more general and available to anyone in the community who is interested in participating.
 - v. This phase centers around showing people the possibilities for their library and gathering aspirational input. For every client, RTL develops a custom conversation enabling presentation deck that is targeted and fostering conversations for the client's community.
 - vi. As a result of the pandemic RTL has become very skilled in stimulating good conversations and discussions through virtual sessions that measure up to the level of engagement and input of our in-person sessions. Some clients choose to have most of their staff discussions done virtually to offer the most time flexibility to staff. However, for the general public, accessibility needs to be kept in mind so as to not keep people out of the process, so it is recommended that a virtual session or two is offered but that most sessions are done in-person.
 - vii. RTL staff have had extensive experience conducting bilingual sessions with non-English speaking residents. Our team member Ivonne was born in Mexico, is fluent in Spanish, and has helped us conduct such bilingual sessions in the past. We are open to conducting sessions in other languages as well, but we cannot provide a translator from our staff.
 - viii. With RTL you always get one of our team members leading your engagement sessions. We only utilize associates for note-taking, never for leading these engagement sessions.
- c. RTL can also work with the Strategic Planning Team to develop and conduct a general web-based convenience survey for the public. Our approach is to work with our clients to promote and advertise the survey on a broad level, targeting users and non-users.
 - i. RTL does not recommend spending extra library funds to conduct full scientific-level studies. RTL has been involved in projects that made this investment and, in the end, did not get fundamentally better or more useful results than with a convenience survey approach. Our approach uses surveying tools to get a good measure of the community's view though certainly skewed a bit toward library user perspectives.
 - ii. A paper version of the survey is also provided to the library (copies supplied by the library) for distribution to those community members who prefer that format. Typically, library staff or volunteers then enter these completed surveys, but RTL can provide this service for a separate fee.
 - iii. A Spanish version of the survey, in both paper and online format will be provided and is included in the fee. If additional versions are needed in other languages there would be an additional fee.
 - iv. Janet leads all work on the Survey, including design, launch support, and analysis.

4. **Develop and deliver the “Findings Book”.** A “Findings Book” is developed from the data and research conducted and is distributed to participants about 1 week prior to the Strategic Retreat. This book includes all of the pertinent information gathered and analyzed during the process. Summaries, key takeaways, in addition to full data sets are all included or linked from the book. Typically, this single PDF document ranges from 80 to 180 pages. The size is largely driven by the number of surveys completed and how much feedback is gathered at the engagement sessions. Rob, Janet, and other team members collaborate to compile this findings book.

Additionally, we will incorporate your EDI work and sustainability partnership with the Village of Northbrook into the strategic plan and findings book, as we discover how these two focus areas become part of your future objectives. We have experience working with libraries in both of these focus areas.

5. **Facilitate a Strategic Planning Retreat.** This is typically a 6-to7-hour long strategy session that usually includes 15 to 25 people including, but not limited to, staff (both supervisory and non-supervisory), board members, community leaders, and general community members. During this *Retreat*, we will distill the input gathered (concentrated in the Findings Book) and discuss that, along with best practices for future-ready public libraries. Through a series of small group and larger group exercises, the session will work to surface top issues and strategic opportunities that will ultimately lead to the final plan. NPL’s current mission, vision, and values will also be reviewed and refined or developed to relate back to the key strategies. Through the retreat process, RTL continues incorporating an aspirational approach to the planning process. The group will work to discover:
 - NPL’s identity (What is NPL? What does NPL want to be?)
 - The key ingredients and focus of NPL strategies
 - NPL’s Mission, Vision, and Core Values

At least two of RTL’s senior team members (Rob, Janet, Randy, and Kathy) will be present at the retreat and at least Rob or Janet will be one of those two. RTL may bring additional team members as deemed necessary or beneficial to the client and the best interests of the process.

6. **Develop a high-level 2-6-page Strategic Plan.** This is the initial deliverable directly resulting from the *Retreat*. This document is the “Quick Reference Guide” that library leadership and staff can live, breathe, and easily refer to on a day-to-day basis. RTL can present this plan to the Board and/or community at the appropriate time if desired.
7. **Assist the Library Planning Team with the creation of a detailed Work Plan.** This document is developed for a 12-month timeframe each year and focuses on the details behind the 2-6-page plan (action steps, tactics, milestones, resources, budget/funding, etc.). It is developed primarily by Library leadership and staff with kickoff assistance from RTL, but the approach can be modified if needed. This is followed by remote guidance and assistance as needed.

Our process develops a long-term vision and identifies the areas where efforts are needed to achieve those goals. The annual work plan details the specifics to achieve progress toward the goals and is evaluated and adjusted on a regular basis. Since it is nearly impossible to predict the future three to five years in advance, we have found the annual work plan to be much more productive as a means to guide the library. Typically, much of the work plan is developed by Library leadership and staff as they are much closer to the needs and capabilities of the Library and the community. As consultants, we are available to help guide the work plan and offer suggestions that help to push the Library in areas that may be outside of their comfort zone, but we can be more involved if needed.

Since the services we offer tend to be bespoke and tailored to the needs of each client, we allow our clients to determine if there are areas where they have staff expertise that may enhance the process. Our process is very collaborative, and our experience has shown that the involvement of Library

leadership, staff, Board, Friends, and the community encourages ownership and creates a plan that is better understood and more easily acted upon.

Deliverables

RTL’s deliverables will/can include:

- A detailed community analysis including demographics and mapping of key social indicators/measurements
- Organizational and community assessments
- A multi-cohort comparison benchmark analysis of primary library metrics, regional, state, national and “best-in-class”
- Collection utilization analysis (turnover and relative use)
- Compiled notes from stakeholder sessions, online survey, etc., which will include key priorities and goals emerging from these inputs and summaries where appropriate
- Outputs from Strategic Retreat including analysis, ideation, and voting exercises
- A 2-6-page high-level *Strategic Plan* focusing on the top 4-6 priorities coming out of the process. *This is structured in a way to be an asset for the board and administration to reference on a consistent basis to gauge progress easily and efficiently.*

SEE APPENDIX B – 2-6 PAGE PLAN EXAMPLES

- Assisting with the development of a detailed *Work Plan* that specifically addresses the details necessary for successfully executing the plan, including actions, timeline, resources, budget, etc. Most of the work here is done by the library staff but with the assistance and guidance of RTL.

Subcontractors

All work will be performed by Rethinking Libraries personnel and not subcontracted.

Timeline Estimates

We will work with NPL to determine the best approach and schedule activities and deadlines. The following outlines a possible approach to timing that RTL can currently support. RTL will work with NPL to develop the timeline that best meets the timing needs and balances the best results in terms of community engagement. We generally recommend doing community engagement from September through November or Mid-January through May for best results. Staff and board sessions can be scheduled during any time of the year that aligns with schedules.

Anticipated Timeline

- | | |
|--------------------|--|
| • July 2023 | Kickoff |
| • August Sept 2023 | Data Gathering and Analysis |
| • September 2023 | Community/Stakeholder Engagement Planning and Promotion |
| • September 2023 | Staff, Board, and Friends Sessions and Interviews |
| • October 2023 | Community/Stakeholder Engagement Sessions and Surveys |
| • November 2023 | Synthesis, Delivery of Findings Book, and Planning Retreat |
| • Nov-Dec 2023 | High-level Plan Development & Delivery to Library – within 2 weeks following the retreat |
| • January 2024 | Final Plan Delivered to the Library Director |
| • January 2024 | 1-Year Detailed Work Plan Development – Training, Support, and |

- Annually

Assistance delivered following the Retreat with ongoing support and assistance until the 1-year plan is complete.
Ongoing Support/Assistance as needed with developing subsequent 1-year Work Plans

Cost Estimate:

Time and Material Option:

For this project, we are offering NPL a **discounted rate** of:

- \$150/hour for Principals (Rob and Janet) (Normally \$170/hour)
- \$140/hour for Consultants (Randy, Kathy, or others) (Normally \$160/hour)
- \$120/hour for Translation/Multi-lingual Facilitation (Ivonne) (Normally \$140/hour)
- \$100/hour for Assistants or Notetakers (Normally \$120/hour)

Work Area / Deliverable	Typical Costs
Overall Project Management / Virtual Kickoff Meeting/ (Required)	\$3,200
Data Gathering and Analysis: Demographics, Multi-cohort benchmark analysis, Collection turnover analysis (Required but adjustable)	\$3,200 to \$5,400 depending on the analysis options selected
Staff and Community Focus Group Facilitation (Required but adjustable)	\$4,500 to \$6,400 depending on how the number and structure of the engagement sessions
Technology Assessment (Optional) (see explanation of services after pricing)	\$5,900 (not included in the total below)
Online Survey Design, Deployment, and Analysis (Recommended)	\$5,100 - \$5,700 for English and Spanish versions (online and print versions) +\$750 additional language translation online only OR,+\$1,200 both print and online
Strategic Retreat, includes all prep, data packet compilation, and virtual or onsite time (Required)	\$5,300 depending on approach and structure, ideally done onsite during a single 1-to-2-day visit.
3-5 Year High-Level Plan Development (Recommended)	\$1,900 includes a virtual presentation to the board/leadership \$500 added for onsite delivery and review
12-Month Work Plan Development Assistance (Recommended)	\$500-\$1,900
Total Likely Range depending on options: (required and recommended elements only)	\$23,700 to \$29,800 plus expenses
Expected Expenses: All travel for the team is at cost Any supplies or photocopying would be billed at cost, but those needs would be minimal.	\$2,600 to \$3,800 total expected range for 2 onsite trips (1 for focus groups and 1 for retreat) more onsite visits are possible

OR...

Fixed Fee Option:

This option gives NPL more predictable costs, but less flexibility in terms of scope of activities. It is limited to the following scope and onsite visits:

- 1 kick-off meeting and data gathering (via Zoom virtual meeting)
- Online survey development, hosting, and management provided by RTL but with promotion and advertising driven by the library, printable version provided by RTL but printed and distributed by the Library (web and print in English and Spanish versions only)
- Data Analysis Options: general demographics and mapping, multi-cohort comparison benchmarks, collection utilization analysis by collection segment/genre
- 3-day onsite visit for stakeholder sessions
 - Stakeholder sessions are capped at 11 sessions total (no more than 4 in any one day and over no more than 3 days, required to be consecutive). Staff sessions and sometimes board sessions are done virtually but at the client's discretion. Up to 3 sessions could be bilingual in English and Spanish with the rest in English only.
 - Typical schedule looks like this:
 - Day 1: 3 sessions starting at Noon
 - Day 2: 4 sessions spread throughout the day
 - Day 3: 3 sessions last session complete by 2 pm
 - Plus 1 Virtual Session schedule before or after the onsite sessions
- 1 full day onsite for *Stakeholder Retreat (~7hrs)*
 - *With one pre-Retreat findings review virtual meeting (1 hour)*
- RTL primary driver of Strategic Plan with Library leadership in support
- Virtual *Strategic Plan* presentation to the board
- Virtual *Work Plan* kick-off meeting with staff
- Library Staff primary execution of Work Plan development with RTL in close support
- All other meetings and work to be completed remotely or via web/video conference, unless RTL, at their discretion, chooses to be onsite

Costs: \$27,500 + expenses

IF NPL would like a fixed fee option for this project but with a different scope, options, or approach we'd be happy to work on a mutually agreeable scope of services and provide a fixed fee option for that as well.

Billing Approach:

- For Time and Material Option billing is done monthly as incurred. Detailed invoices are provided with all expended time and incurred expenses listed with receipts.
- For the fixed price option, billing is handled in four phases
 - Phase 1: 25% -- Billed after initial kickoff meeting
 - Phase 2: 25% -- Billed after start of stakeholder engagement sessions and/or survey
 - Phase 3: 25% -- Billed after start of strategic retreat
 - Phase 4: 25% -- Billed after the delivery of the High-Level-Plan to the Library
- For both options, these expenses will be billed as they occur:
 - Travel expenses will be billed at cost.
 - Any other miscellaneous (printing, shipping, etc.) expenses will be billed at cost but will be minimal.

OPTIONAL Technology Assessment:

This is a new optional RTL offering, based around new Senior Consultant, Randy Maxey, joining our team. Randy, in conjunction and with support from Rob and part-time associate Toby Greenwalt, would do an overall assessment of the Library's technology position. We look at all areas technologies touch in the library: infrastructure, equipment, software platforms, processes, support levels, and provide feedback and guidance on best practices and the state of the library's current systems, offerings, and capabilities in comparison. We will also conduct a short staff survey on the state of library technology and an anonymous self-assessment of their own technology skills and proficiencies. A Technology Systems and Services report card is produced highlighting all of these areas where the library is hitting the mark and where it could potentially use additional attention or resources. This would be an additional element added to the Findings Book, but also serves as a stand-alone report.

References

Su Reynders, Executive Director

Mount Prospect Public Library

10 S Emerson St, Mount Prospect IL 60056

847-590-3220

sreynders@mppl.org

***Projects:** Beginning in December 2021 and finishing in June 2022, we facilitated and collaboratively developed MPPL's newest strategic plan using all of our standard planning services. In addition to our typical services, a Spanish survey and facilitation of a multi-lingual community session was included we conducted a virtual staff workshop that was attended by over 120 staff members.. MPPL had one of our most successful survey campaigns with over 2,000 completed surveys by the community.*

Jennifer Pearson, Director

Tuscaloosa Public Library

1801 Jack Warner Parkway, Tuscaloosa, Al

205-345-5820 x1250

execdirector@tuscaloosa-library.org

***Project:** Initially RTL was engaged in 2021 to do a Feasibility and Facility Plan. That engagement evolved into other projects including a 5-year Strategic Plan which also included a plan for their Foundation and an expanded Facility Plan. The scope was modified to incorporate a mini-retreat early in the process to surface some immediate needs for the short term.*

Karrie Waarala, Director

Saline District Library

555 N Maple Rd, Saline, MI

734-401-1261

karrie@salinelibrary.org

***Project:** Strategic planning was initiated in December 2019 for SDL's 2020-2025 Plan. This project was well underway with data gathering, community sessions, and survey were completed and we and preparing for a Strategic Retreat when the COVID-19 pandemic hit. The project was put on hold but restarted and was completed in the Fall of 2021.*

We encourage you to speak to any of our clients or references or you may refer to RTL's website at www.rethinkinglibraries.org for additional information. Sample High-level Project Plans can be found in Appendix B.

APPENDIX A:

Resumes

ROBERT CULLIN

Email: rob@rethinkinglibraries.org



ReThinking Libraries

2004 – present (2004 -2019 dba as Kimberly Bolan and Associates, LLC)

Managing Principal / Library Evolutionist

Prior to starting ReThinking Libraries, LLC with Janet Nelson, Rob helped establish Kimberly Bolan & Associates in November 2004. His consulting work kicked off when he co-authored *Technology Made Simple with Kim Bolan* and began writing and presenting together with her across the USA. Rob has been involved in all of RTL's strategic plans and most of the strategic planning work completed by KBA. He has also completed a number of facilities projects under both organizations. Through his work as the Co-Founder of Evanced Solutions LLC and later at Demco, Inc., he has been involved with thousands of libraries around the world. With a broad set of experiences reaching even beyond libraries, Rob has direct specialties in community engagement, strategic planning, technology, data, demographic & psychographic analysis, marketing, and organizational design.

Relevant Project Experience:

Jennings County Library (IN) – Planning & Design, Strategic Planning, Org. Development (2014-Present)
Tuscaloosa Public Library (AL) – Strategic and Facilities Planning, Feasibility Study (2021-Present)
Mount Prospect Public Library (IL) – Strategic Planning (2021-2022)
Newburgh-Chandler Public Library (IN) – Strategic Planning (2021-Present)
Saratoga Springs Public Library (NY) – Strategic Planning (2020-2021)
West Haven Library (CT) – Strategic Planning and Efficiency Study (2020-2021)
Adrian District Library (MI) – Strategic Planning and Facility Planning (2020-Present)
Saline District Library (MI) – Strategic Planning (2019-Present)
Redford Township District Library (MI) – Strategic Planning (2018)
Free Library of Philadelphia (PA) – POE Study (2018-2019)
Allen County Public Library (IN) – Facility Programming, Planning & Design, Strategic Planning (2017-2018)
Indianapolis Public Library (IN), New Eagle Branch – Facility Programming, Planning & Design (2017-2019)
St Joseph County Library (IN) – Facility Master Plan (2017)
Hamilton East Public Libraries (IN) – Facility Programming, Planning & Design (2015-2019)
Lincoln County Public Library (NC) – Facilities Master Plan (2016-2017)
Community Library Network (ID) – Facility Programming and Planning for 7 Branches (2015-2018)
Anderson Public Library (IN) – Strategic Planning and Facility Planning (2015-2019)
Greenwich Library (CT) – Facilities & Services Planning and Design (2013-2018)

ADDITIONAL EXPERIENCE:

Evanced Solutions, LLC, Indianapolis, Indiana

2002 – 2014

President and Co-Founder

As part of Demco, Inc. Madison, Wisconsin

2011 – 2014

Vice President

PUBLICATIONS:

Technology Made Simple, Chicago: ALA, 2007.

"Web, Library, and Teen Services 2.0," *Young Adult Library Services*, Winter 2007.

"Technology Planning: The Big Picture for Small Libraries," *WebJunction* (November 20, 2006).

HONORS AND AWARDS:

2008 Library Journal's Movers and Shakers Award

EDUCATION:

Purdue University, West Lafayette, IN and Indianapolis, IN, B.S. Electrical Engineering Technology
GE Six Sigma – Green Belt Certified

JANET NELSON

Email: janet@rethinkinglibraries.org



ReThinking Libraries

2019 – present (initially dba Kimberly Bolan and Associates)

Principal and Senior Consultant

Janet co-founded ReThinking Libraries, LLC with Rob Cullin in 2020. Prior to that, she began her career in the library industry in 1999 as a Furniture Product Manager with Demco, Inc. During her time there, she worked in a variety of roles but always with a focus on providing libraries across the US with the products and services to best serve their communities. She was part of the team that envisioned and developed a service offering, known today as Demco Interiors. Janet began collaborating with Kimberly Bolan & Associates, LLC on design projects in 2006, starting with teen spaces. The collaboration evolved into more comprehensive library projects, speaking engagements, and co-authoring articles on library trends.

In addition to her furniture/project experience, Janet has been involved in market research, strategic planning, and customer engagement, all focused on more thoroughly understanding and serving library needs. While at Demco she facilitated a “What’s Next?” Forum, bringing together visionary library leaders and launched the online *Ideas & Inspiration* platform to share library ideas. With a broad set of experiences reaching even beyond libraries, Janet has direct specialties in strategic planning, marketing, research and development, and space planning.

Relevant Project Experience:

- Sun Prairie Public Library (WI) – Strategic Planning (2022-Present)
- Tuscaloosa Public Library (AL) – Strategic and Facilities Planning, Feasibility Study (2021-Present)
- Durham Public Library (CT) – Strategic Planning (2022-Present)
- Jennings County Public Library (IN) -- Strategic Planning (2022-Present)
- Mount Prospect Public Library (IL) – Strategic Planning (2021-2022)
- Fulton County Public Library (IN) – Strategic Planning (2021-2022)
- Newburgh-Chandler Public Library (IN) – Strategic Planning (2021-2022)
- Saratoga Springs Public Library (NY) – Strategic Planning (2020-2021)
- West Haven Library (CT) – Strategic Planning and Efficiency Study (2020-2021)
- Adrian District Library (MI) – Strategic Planning and Facility Planning (2020-2022)
- Saline District Library (MI) – Strategic Planning (2019-2021)
- Catawba County Public Library (NC) – Strategic and Facilities Planning (2019-2020)
- Handley Regional Library (VA) – Facility Assessment (2019-2020)

ADDITIONAL EXPERIENCE:

Nasco, Inc., Fort Atkinson, WI

2017 – 2019

Category Manager, Elementary Education/Early Learning

Demco, Inc., Madison, WI

1999 – 2016

Director, Library Engagement and Solutions

- Collaborated on content strategy that included creation of *Ideas + Inspiration* website, webinars and relevant information and articles
- Developed *What’s Next?*, a customer forum of influential public librarians, to explore future library needs
- Co-led start-up of Demco Interiors from feasibility studies to a fully operational business unit

PUBLICATIONS:

“Just for Them”, *Library Journal’s Library by Design*, May 2010.

Demco Ideas & Inspiration Blog Posts and Webinars, 2012 – 2016

Demco Interiors Blog, 2012 – 2016

EDUCATION:

University of Wisconsin-Stout, Menomonie, WI, M.S. Home Economics: Clothing (Design & Manufacturing)

University of Wisconsin-Stevens Point, Stevens Point, WI, B.A. Fashion Merchandising

RANDALL MAXEY

Email: randy@rethinkinglibraries.org



ReThinking Libraries

2022 -- present

Senior Consultant

Prior to joining ReThinking Libraries, LLC, Randy spent much of the last 15 years working with libraries across North America in various capacities. After 30 years in the banking industry, Randy began his library world experience with the NovelList division of EBSCO. He worked with libraries across the US and Canada to bring a better reader experience to patrons. Additionally, he worked with the internal team to help create new features for the product set as well as rebranding the products. He led both the sales and marketing teams in this role. It was during this role that Randy met Rob. In 2016, Randy became the Sales Director for Demco Software, which was a combination of Boopsie and Evanced applications for libraries. In this role, Randy met Janet. In 2018, Randy left Demco to join Bibliotheca, as the North American Account Exec for open+ a solution that allows for extended access for library users. This role transitioned to a Southeast Account role, where he was able to help libraries create a more efficient workflow for staff and a better patron experience. In July of 2021, he took the role of Partnership development and worked with the firm's partners across North America.

Upon retiring from Bibliotheca in 2022, Randy joined ReThinking Libraries where he is able to bring the knowledge he has gained over the years to his role as a consultant. Randy has worked with hundreds of libraries around North America and partners worldwide to help create better user experience outcomes for both staff and library users, be it with data, devices, or content. With a broad set of experiences reaching beyond libraries, Randy has direct specialties in strategic planning, technology planning, marketing, and research and development.

Relevant Project Experience:

- Novi Public Library (MI)- Strategic Planning (2023-Present)
- Glencoe Public Library (IL)- Strategic Planning (2023-Present)
- Delray Beach Public Library (FL) – Strategic Planning (2022-Present)
- Pike County Public Library (IN) – Strategic Planning (2022-Present)
- Lincoln County Public Library (NC) – New branch technology design and implementation
- Harnett County Public Library (NC) – RFID conversion and technology design for new Main Library (2019-2020)
- Atlanta Fulton County (GA) – AMH design and implementation, self-check implementation (2018-2019)
- Gwinnett County (GA) – Self-service implementation-open plus-self-checks (2019-2021)
- Prince William County (VA) – Introduction of self-check technology (2019)

ADDITIONAL EXPERIENCE:

Bibliotheca

*VP Partner Sales
Account Executive*

2018 – 2022

Demco, Inc., Madison, WI

Director of Sales, Demco Software

2016 – 2018

EBSCO/NovelList

Sales and Marketing Director

2009 – 2016

EDUCATION:

- University of North Carolina, Charlotte, NC Master of Business Administration
- University of South Carolina, Columbia, SC, B.S. Economics

KATHY STEWART

Email: kathy@rethinkinglibraries.org



ReThinking Libraries

2023 -- present

Senior Consultant

Kathy has spent much of the last 30 years involved with libraries across North America, Canada, and Australia in various capacities. Starting as a children's librarian at the Richland Library, Kathy moved into a branch management role and supported library marketing efforts. From there she has leveraged her experience to help several library-focused vendors as they discovered library priorities and empowered libraries with tools to connect patrons to library materials and services. During her time with EBSCO's NoveList and later with Patron Point, Kathy assisted libraries by providing user-facing content, delivering training and webinars for libraries as they furthered their own readers' advisory and marketing initiatives. At Bibliotheca, she helped public and academic libraries connect their users with more convenient access to resources. Kathy values building library communities and forums for libraries to learn from each other.

Upon leaving Bibliotheca, Kathy joined ReThinking Libraries where she is able to bring the knowledge she has gained over the years to her role as a consultant. Kathy is passionate about helping libraries do what they do best; transforming the lives of those in the communities they serve. With a broad set of experiences, Kathy has direct specialties in marketing, community engagement, data analysis and performance metrics, and training.

Relevant Project Experience:

- Anderson County Public Library (SC) – Self-check and Remote Locker Implementation
- Gwinnett County Public Library (GA) – open+ Extended Access Implementation
- Chattahoochee Valley Libraries (GA) – Introduction of Remote Locker System and Implementation
- Union County Public Library (NC) – Introduction of AMH/Design
- ABBE Regional Library Systems (SC) – Self-check Equipment Consultation/Refresh

ADDITIONAL EXPERIENCE:

Bibliotheca, Norcross, GA <i>Account Executive</i>	2022 – 2023
Patron Point, Dublin, OH <i>Library Relations Manager</i>	2021 – 2022
EBSCO/NoveList, Durham, NC <i>Sales and Marketing Consultant</i>	2015 – 2021
Richland Public Library, Columbia, SC <i>Branch Manager -- Blythewood</i>	2015 – 2021

WEBINARS/TRAINING/PUBLICATIONS:

Patron Point Community Engagement: Webinar: *Streamlining Summer Reading Programs*; Facebook User Group; Monthly Newsletter

EBSCO/NoveList: Customized on-site training sessions; readers' advisory-focused articles and blog posts

EDUCATION:

- University of South Carolina, Columbia, SC Master of Library Science – concentration in K-12
- University of South Carolina, Columbia, SC B.A. Journalism – concentration in Legal Studies

APPENDIX B:

Sample Strategic Plans

These are just a sampling of the variety of plan formats we've developed for our clients. We'll work with you to make sure the format of your plan is optimized to how you want and need it.



Mount Prospect
Public Library

Strategic Plan

July 2022 – June 2025

Approved by the MPPL Board of Trustees June 16, 2022

Mount Prospect Public Library
Strategic Plan 2022-2025

Introduction

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.

Over the past two years, there have been changes in the world at large due to the global pandemic that have made it essential for the Mount Prospect Public Library (MPPL) to seriously evaluate if the needs of the community are being met. This strategic plan is meant to be used as a roadmap for meaningful change. The ultimate goal of this process was to hear directly from the community how the library can best serve them.

Background

The library last completed a strategic plan in 2019. That plan, effective from 2019 through 2023, was a hybrid strategic and operational plan created primarily by staff. In March 2020, when the pandemic emerged, the plan was put on hiatus. In 2021, the Board of Trustees approved a set of short-term goals designed to address the current environment. In late 2021 the Board approved a new strategic planning timeline and agreed to separate the strategic plan from the operational plan.

ReThinking Libraries, a professional strategic planning consulting firm, was hired to coordinate and facilitate the activities. The planning process was kicked off in January 2022 and the final plan was officially approved by the library board in June 2022. This plan will be effective from July 2022 through June 2025.

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:

- All-community survey (Over 2,000 received)
- Strategic Retreat (11 staff, 4 trustees, 4 community members)
- Staff and Board input sessions (6 sessions, 120 attendees)
- Community input sessions (12 sessions, 165 attendees)
- Mount Prospect demographic data and maps
- Key library related results from the Village 2020 survey
- Library benchmark analysis
- Collection utilization analysis

See the supplemental "Findings Book" for a comprehensive overview of the input received during the strategic planning process.

Mission Statement

A mission statement answers the question, "Why do we exist?" The library's current mission statement was reviewed during input sessions, and a new statement was written based on feedback.

- Cultivating community connections, inspiring learning, and enriching lives.

Vision Statement

A vision statement answers the question, "What do we want to achieve?" The library's current vision statement was reviewed during input sessions, and a new statement was written based on feedback.

- A connected community with opportunities for exploration and growth.

Values

Values define the culture and character of the library, and answers the question, "How do we behave?" The library's current values were reviewed during input sessions, and new values were written based on feedback.

- Community focus. Providing relevant services and fostering community connections.
- Adaptability. Being nimble and flexible to creatively meet changing needs.
- Inclusivity. Supporting and valuing the diverse needs of all.
- Welcoming. Creating an inviting, safe, and easy to use environment.
- Accessibility. Ensuring easy access to materials and services whenever and wherever needed.
- Learning. Encouraging an ongoing pursuit of knowledge and discovery that enriches lives.

Initiatives, Goals, Activities

The strategic initiatives, goals, and activities are the outcome of the data-gathering process and comprise the core of the strategic plan. They answer the questions, "What are our priorities and how are we going to address them?"

Strategic Initiatives

The strategic 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 three years.

- A. User Focused Spaces
- B. Community Focused Services and Awareness
- C. Improved and More Available Materials and Resources

Goals

Goals are designed to focus on what the community receives and not on the resources the library needs to deliver the service.

Activities

Activities are meant to illustrate possible actions the library will complete in order to meet the goals of the plan. They are not intended to be absolute, but rather realistic suggestions that reflect the current 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.

Strategic Initiative A: User Focused Spaces

Goal A1: Provide residents with user-focused, comfortable, and inviting spaces that prioritize usage based on community needs and are furnished with modern, comfortable, and accessible furniture and fixtures.

Activities:

- A. Contract with an architect to create a facility Master Plan for the Main Library.
- B. Identify implementation timeline and funding of the Master Plan for the Main Library.
- C. Collaborate with the Village of Mount Prospect to expand, improve, or relocate the Community Connections Center that houses South Branch and Human Services.
- D. Evaluate the partnership with the Village and Human Services to define the benefits and requirements of sharing the Community Connections Center space.
- E. Identify expanded services and resources necessary to occupy an expanded, improved, or relocated South Branch.
- F. Identify and implement short-term improvements to the South Branch space, including minor space reutilization and improved furniture and fixtures.

Goal A2: Enable patrons to intuitively find their way through library spaces with excellent wayfinding and signage at all locations.

Activities:

- A. Conduct a signage audit in conjunction with Goal A1 and implement recommendations as appropriate at all locations.
- B. Create a new patron-focused website with simplified navigation and standardized naming conventions.

Goal A3: Provide eye-catching and interesting displays throughout all locations to enable unexpected and organic discovery of materials and resources by patrons.

Activities:

- A. Conduct a display and shelving audit in conjunction with Goal A1 and implement recommendations as appropriate.

Strategic Initiative B: Community Focused Services and Awareness

Goal B1: Provide convenient, non-traditional services that add value to the library's contributions to the community.

Activities:

- A. Evaluate providing passports and/or license plate stickers.

Goal B2: Offer a wide variety of interesting adult programs that appeals to a range of audiences.

Activities:

- A. Evaluate current adult programming and incorporate new ideas from the strategic planning results.

Mount Prospect Public Library
Strategic Plan 2022-2025

- B. Increase the coordination of adult programs across MPPL departments, including South Branch.

Goal B3: Meet patrons where they are and further embed library services and outreach within the community.

Activities:

- A. Evaluate the feasibility of installing kiosks, vending machines, or other self-service systems within the community.
- B. Investigate purchasing an outreach vehicle, such as a bookmobile or van, including what services could be provided “on the road.”
- C. Identify and evaluate added outreach visits and/or programming to senior homes, multifamily dwelling units, churches, and other spaces where the community congregates.

Goal B4: Provide in-house library services at times that are convenient for patrons and utilize staff resources during the most popular times.

Activities:

- A. Evaluate library hours at all locations and adjust to meet community needs.
- B. Review the list of closed days and adjust to address new or changed state or federal holidays.

Goal B5: Patrons will be aware of library offerings through a variety of channels, tailored to meet community needs.

Activities:

- A. Develop standardized, evergreen service offering materials in a variety of mediums that are suitable for new residents, new cardholder orientation, outreach events, etc.
- B. Create library card campaigns that target a variety of audiences and remove barriers to library sign up and use.
- C. Assess current communication efforts and identify a strategy to create and implement a marketing plan that is targeted and curated to best distribute information to the community.

Strategic Initiative C: Improved and More Available Materials and Resources

Goal C1: Patrons will find the materials they want, when they want, for reading, viewing, and listening for pleasure and knowledge.

Activities:

- A. Evaluate joining a resource-sharing consortium or group and make a formal recommendation to the Board that includes an implementation timeline and funding solutions.
- B. Increase the budget allocation for electronic materials with the intent to reduce wait times for popular materials.
- C. Establish a non-holdable collection consisting of popular materials, targeted to the browsing patron.

Goal C2: A variety of practical, fun, and up to date technology and other resources will be available to patrons to use at the library and check out to use remotely.

Activities:

- A. Conduct public technology audit to identify opportunities for improvement, ensuring that public technology is comprehensive, up to date, and easy to use.
- B. Increase number and type of circulating resources (i.e. Library of Things).
- C. Create a limited Digital Media Lab at the Main library that includes some makerspace elements.
- D. Evaluate opportunities to provide dedicated space for technology and makerspace resources at all locations.

Organizational Competencies

Even the best-run libraries may have room for improvement in certain operational areas, and these issues can make it difficult to provide services regardless of the library's priorities. Organizational competencies are what the library must do in order to improve the ability to provide the desired services articulated in the goals and are meant to increase the library's effectiveness and efficiency. In this plan, the impact of the pandemic on staff resources is addressed.

A. Marketing/Public Relations/Communications/Graphic Design

1. Clarify the objective of the department and clearly identify the purpose and desired outcomes. Collaborate with other library departments to identify priorities and best practices in order to maximize patron awareness.
2. Conduct a departmental assessment, including divisions of responsibility and workload.
3. Evaluate staffing and resources and adjust to meet the identified needs of the library, including revising processes and procedures as necessary.


B. Public Services


1. As the majority of this plan includes additions, improvements, and increases to public services, each public service department will conduct an assessment to identify what existing offerings need to be adjusted, shifted, or reduced to accommodate the new and improved services. During the assessment, staff will identify services that are no longer adding value. These services will be ended gently, understanding that they may be brought back in the future as needed. This assessment should include an evaluation of current staffing and budget resources.

Evaluation Process

This plan is designed to be flexible and responsive to changes in the economic, demographic or sociopolitical climate. The strategic initiatives and goals are broad enough to allow for necessary modifications to the activities that are carried out. Library management will work closely with the Board of Trustees prior to finalizing and implementing activities over the next three years. Progress will be reported at each regular library board meeting.

Initiative	Goal	Activities	Outcome
 <p>User Focused Spaces</p>	<p>Provide inviting, comfortable, modern, and accessible spaces that meet a variety of patron needs</p>	<ul style="list-style-type: none"> • Develop and implement a facility Master Plan (Main) • Improve and expand the South Branch facility • Implement intuitive wayfinding • Create a new easy-to-navigate, simplified website • Install engaging materials and resources displays 	<p>The community perceives the spaces are attractively and effectively supporting the needs of all users</p>
 <p>Community Focused Services & Awareness</p>	<p>Expand awareness and use of the library and its physical and virtual services</p>	<ul style="list-style-type: none"> • Provide convenient community services at the library • Create fixed and mobile satellite service locations • Expand off-site programming and outreach • Improve and expand adult programming • Adjust library facility availability to meet community needs • Create and implement a comprehensive marketing plan • Develop and implement library card campaigns • Create readily available evergreen service materials 	<p>The library is considered an important, relevant, and convenient community resource</p>
 <p>Improved & More Available Materials & Resources</p>	<p>Increase use of and satisfaction with the library's materials and resources</p>	<ul style="list-style-type: none"> • Expand access to materials through resource sharing • Allocate funds to electronic materials to meet demand • Create a dedicated collection for in-library browsing • Provide up to date technology and circulating resources • Expand digital media and makerspace tools and resources 	<p>Patrons are satisfied with quality materials and resources that are obtainable quickly and conveniently</p>

 Our **mission** is cultivating community connections, inspiring learning, and enriching lives.

 Our **vision** is a connected community with opportunities for exploration and growth.

 We **value**

Community focus. Providing relevant services and fostering community connections.

Adaptability. Being nimble and flexible to creatively meet changing needs.

Inclusivity. Supporting and valuing the diverse needs of all.

Welcoming. Creating an inviting, safe, and easy to use environment.

Accessibility. Ensuring easy access to materials and services whenever and wherever needed.

Learning. Encouraging an ongoing pursuit of knowledge and discovery that enriches lives.



Saline District Library

2022 to 2026 Strategic Plan High-Level

Adopted: October 20, 2021



Process Facilitated by
Rob Cullin & Janet Nelson

Saline District Library – Strategic Plan for 2022-2026



OVERVIEW OF METHODOLOGY:

Beginning in January 2020 and completed in October 2021, under the guidance of Saline District Library's (SDL) Library Director and Board of Trustees, the strategic planning process was completed for the Saline District Library for years 2022 – 2026. Library consultants Rob Cullin and Janet Nelson of ReThinking Libraries (RTL) facilitated the process and analyses, but the library and their community made all of choices and decisions in the process.

The Process

SDL's strategic planning process included the following key areas.

Gathering and analyzing community input and data, which involved benchmarking, demographic analysis, and collection analysis. In addition, SDL staff and Saline area residents were involved in exploring ideas and possibilities for the library as a thriving 21st century library. Stakeholder sessions were conducted by RTL February 5-7th, 2020. Participants included the general public, Saline City Council, educators, Coalition for a Quality Community, business leaders, the arts community, senior citizens, Friends of the Library, SDL staff members, and library trustees. Participants included frequent library users and infrequent and non-users and ranged in ages and backgrounds. Overall, one hundred three (103) stakeholders participated in the discussions regarding SDL's services and strategic future. Since our process was interrupted due to the COVID-19 pandemic we conducted an additional staff session on August 27, 2021. In addition to the stakeholder sessions, an online survey was conducted between February 6th and March 5th, 2020. Four hundred twenty-eight (428) surveys were completed. Survey participants included frequent library users (81%) as well as infrequent and non-users (19%). Survey takers ranged from under 19 to over 75 years of age. About 77% of survey takers were between the ages of 26 and 65 years of age, 17% were over 65 and 4% were under 25 years of age.

Developing solutions during a one-day Strategic Planning Retreat held on August 28, 2021. During the Retreat, all data and community input was reviewed with a planning team of fifteen (15) people, consisting of the library director, staff members, library board members, community leaders, and the general public. From the data, the group worked to establish essential strategic areas, specific goals, and related investments required to implement the goals to help the library thrive over the next five years and beyond.

What We Heard

The stakeholder sessions and online survey explored several topics including customer service, youth services, adult services, local history and genealogy, outreach services, programming, technology and digital services, the facility/building, collections and resources, collaboration and partnerships, community awareness, and overall 21st century public library best practices. Detailed summaries of all stakeholder feedback and online survey results were provided in separate documents to SDL's leadership and reviewed in depth during *the Strategic Planning Retreat*. All stakeholder input, data analysis, and follow-up exploration work led to the strategic focuses, goals, and investments outlined on pages six- ten of this document.

Evaluation & Collaboration

With the goal of achieving all outlined goals over the next five years, SDL administration, staff, and board of trustees will regularly evaluate their progress and achievements. Objectives set forth in this plan will be further detailed each year in a 12-month detailed work plan developed by the library staff. These annual 12-month plans will address specific actions, objectives, and goals in addition to specifying timing, required staff and financial commitments. In addition, the high-level plan contained in this document will be re-evaluated each year by the board prior to the development of the next 12-month plan to ensure the high-level goals still align with the needs and goals of the community. This balanced and systematic process also emphasizes that the resulting plan will be iterative and evolve substantially over the next several years.

The keys to SDL's implementation, evaluation and, ultimately, the success of its strategic plan will be:

- A thorough understanding of the plan as well as active involvement in implementing the plan by staff and the Board of Trustees
- Frequent and ongoing communication between administration and staff
- Frequent and ongoing communication between SDL's staff and its community
- Active collaboration between SDL's Board of Trustees, City Council, administration, staff, outside organizations, and the community

SDL Revised Mission-Vision-Values



MISSION

Saline District Library ignites a joy of discovery and builds community through resources, opportunities, and new ideas.

VISION

Our vision is a community empowered to discover, connect, and grow.

VALUES

The Saline District Library values:

1. Welcoming – Offering an inclusive and respectful environment where everyone feels welcome
2. Accessibility – Ensuring spaces, resources, and services for all within and beyond the walls of the library
3. Community – Creating meaningful, customer-focused experiences that engage, reflect, and enhance the community
4. Learning – Encouraging enrichment and lifelong learning through diverse resources and programs
5. Discovery – Sparking imagination and a sense of wonder that enriches lives

SDL: Strategic Focus Areas



SDL will optimize indoor and outdoor library spaces to evolve as a destination within the community, providing experiential and interactive environments that delight users and improve quality of life.

- Ensure a variety of universally accessible spaces for all types of needs.
- Create more experiential and interactive learning environment.
- Make indoor and outdoor spaces as inspiring, inviting, and functional as possible.

1: Optimize Spaces

SDL will increase connections and services beyond the walls of the library.

- Provide resources and services to users throughout the community.
- Play a key role within the community through engagement, example setting, and exchanging best practices.
- Increase and deepen relationships and partnerships with organizations throughout the area.

2: Increase Connections

SDL will continue to adapt and optimize resources and services to meet the community's needs.

- Ensure resources, programs, and services are relevant, useful, and seen by the community as vital.
- Strive to make Diversity, Equity, and Inclusion an integrated part of organizational culture.
- Positively impact arts, culture, education, and other organizations within the community through the library's services and resources.

4: Enhance Resources

SDL will further build the library brand in the community and drive increased awareness

- Expand physical and digital marketing efforts to create connections and awareness within the community.
- Leverage relationships and partnerships to deepen library connections with the community.
- Continue to build the library's brand throughout the broader Saline area.

3: Expand Awareness

1: Optimize Spaces

SDL seeks to optimize indoor and outdoor library spaces to evolve as a destination within the community, providing experiential and interactive environments that delight users and improve quality of life.

- Ensure a variety of universally accessible spaces for all types of needs.
- Become a more experiential and interactive learning environment for users of all ages.
- Make indoor and outdoor spaces as inspiring, inviting, and functional as possible

Priority Initiatives:

- Take a deep look at the current layout and space utilization of the library. Look at how those spaces need to be adjusted/updated and evolved to meet the current and future needs of the community and library users of all types and needs.
- Evaluate the current usage and availability of outdoor space surrounding the library. Look for innovative ways to better utilize and activate green space(s), look for ways to support usage and programming in these outdoor spaces.

Outcomes:

- Library is seen as a top destination for lifelong learning, leisure, and as a key 3rd place within the Saline area.
- Library is seen as an experiential and engaging destination for all ages.
- The library's outdoor spaces set a leading example for community spaces throughout the area.
- The library's spaces, services, and resources meet a high level of accessibility.

2: Increase Connections



SDL will increase connections and services beyond the walls of the library.

- Provide resources and services to users throughout the community.
- Play a key role within the community through engagement, example setting, and exchanging best practices.
- Increase and deepen relationships and partnerships with organizations throughout the area.

Priority Initiatives:

- Further invest and expand the library's outreach services and capabilities focusing on constituents with the highest needs and lowest access in terms of materials, programs, and technology.
- Continue to build a strong staff and leadership focus on diversity, equity, and inclusion, making these key elements of the library's culture and everyday work, services, programming, staffing, and actions.
- Invigorate relationship with Friends of Saline District Library, including promoting volunteer opportunities.

Outcomes:

- Outreach services reach a higher percentage of underserved and more remote residents throughout the district.
- Community partnerships are expanded and/or strengthened to drive both awareness and accessibility.
- Library is seen positively as shearing information and engaging the community around issues where the library is playing a leading role: e.g., Education, DEI, and Community Engagement.
- Community organizations and agencies see the library as a critical partner to engage with on community related issues and initiatives.
- Community organizations seek the library as a first stop in launching new community initiatives or when they want to convene a larger audience around a specific concern or community focused issue.
- The library is a key player or even organizer in efforts to develop contingency plans around future community crises, such as pandemics, that may affect the broader area.

3: Expand Awareness



SDL will further build the library brand in the community and drive increased awareness.

- **Expand physical and digital marketing efforts to create connections and awareness within the community.**
- **Leverage relationships and partnerships to deepen library connections with the community.**
- **Continue to build the library's brand throughout the broader Saline area.**

Priority Initiatives:

- Evaluate current marketing approaches for effectiveness and seek to better target marketing going forward.
- Consider more print promotional materials, e.g., newsletters, postcards, mailings.
- Upgrade the library's social media presence (depth and channels) and develop more digital content to engage more users and highlight content and issues important to the community.
- Expand the use of and library investment in community partnerships to further the marketing outreach capabilities of the library.
- Upgrade the SDL sign near the road.

Outcomes:

- Awareness of library services and resources are high among district residents, particularly within underserved and higher need segments of the community.
- Most residents of the district have a strong sense of what the library has to offer in terms of spaces, services, resources, etc.
- Saline area residents and organizations have enhanced engagement with the library.
- The library is considered the place to go for information about the local area.
- The library is an often-considered option when area residents are looking for something to do or somewhere to go.

4: Enhance Resources

SDL will continue to adapt and optimize resources and services to meet the community's needs.

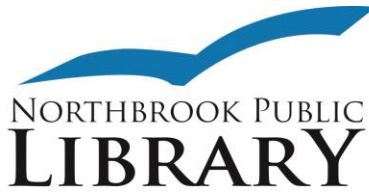
- **Ensure resources, programs, and services are relevant, useful, and seen by the community as vital.**
- **Strive to make Diversity, Equity, and Inclusion an integrated part of organizational culture and approaches to all services.**
- **Positively impact arts, culture, education, and other organizations throughout the community through the library's services and resources.**

Priority Initiatives:

- Ensure that DEI (Diversity, Equity, and Inclusion) are key components in the growth and evaluation of resources and services offered by the library.
- Look for new ways to engage users and the community in programming. Seek more input on programs and additional community participation in programming. Look at programming as more of a community collaboration instead of "classes being offered by the library."
- Reevaluate material usage and collection development policies, looking to best align community/user needs and wants with collection management approaches and policies.
- Examine all library usage and approaches for how well they serve user access needs, stand up to scrutiny related to DEI, and provide a focus on serving user needs over staff convenience.

Outcomes:

- Library is known for offering the top learning leisure programming within the area.
- Library's physical and digital resources and materials meet or exceed community needs and desires.
- The library's programming is highly attended, and users share their good experiences with fellow residents.



1201 Cedar Lane • Northbrook, IL 60062 • 847.272.6224 • www.northbrook.info

STRATEGIC PLANNING SERVICES RFP COVER SHEET

Name: Sarah Keister Armstrong

Organization: Sarah Keister Armstrong + Associates

Email: sarah@skaassociates.com

Phone: (224) 305-2701

Address: 218 Greentree Parkway

City/State/Zip code: Libertyville, IL 60048

Checklist:

- A list of key personnel
- A summary of the consulting firm's qualifications and relevant experience. The successful firm and their subcontractors will have demonstrated expertise in strategic planning.
- A work plan that includes
 - a description of the methodology,
 - list of tasks,
 - project timeline, and
 - estimated total amount of time that would be spent on the project.
- Exclusions or exceptions.
- A schedule of costs that includes
 - consulting,
 - supplies,
 - number of onsite and virtual visits and cost per trip, and
 - other costs associated with the planning process.
 - data gathering and analysis (community research component) must be listed separately.
- List of 2-3 references of libraries or nonprofits who have been your clients within the last three years, including names, contact information

April 10, 2023

Kate Hall
Library Executive Director
Northbrook Public Library
1201 Cedar Ln.
Northbrook, IL 60062

Dear Kate:

Thank you for considering our enclosed proposal to provide strategic planning consulting services to the Northbrook Public Library. We have closely followed the successes and innovations of your library over the years and remain impressed with your commitment to continual improvement of service for your community.

We view this project as an opportunity to contribute to that improvement through a process that studies, engages, and responds to the community. This aligns strongly with the philosophy of our firm and the approach we have implemented in our many successful strategic planning projects with public library clients.

Building a comprehensive library strategic plan requires a rigorous process of data gathering, analysis, stakeholder engagement, group facilitation, foresight, implementation, and evaluation. Our backgrounds in community outreach, data and statistical analysis, quantitative and qualitative evaluation, and planning for public libraries provide us with the expertise to provide end-to-end service in facilitating community-focused strategic planning projects.

We would relish the opportunity to help the Northbrook Public Library build upon its existing successes to best understand and serve your outstanding community. Please see our detailed proposal outlining a scope of work to facilitate this process. Thank you for your consideration.

Sincerely,



Sarah Keister Armstrong
Principal Consultant



KEY PERSONNEL

Resumes enclosed as attachment.

SARAH KEISTER ARMSTRONG, PRINCIPAL CONSULTANT

Sarah has provided evaluation, strategic planning, and grant writing consulting services to public and nonprofit organizations since 2013. She brings experience in statistical analysis and using quantitative and qualitative measures to evaluate public policies and programs.

Her expertise helps organizations effectively collect and analyze meaningful data, determine the implications of data on organizations' planning goals, and communicate the nexus of data, planning, and action. Her work as a trustee of library organizations at the local, regional, and statewide level in Illinois has positioned her at the forefront of change within the industry.

Sarah regularly presents to professional audiences about strategies to successfully incorporate data-driven practices into their community engagement and planning work.

Key Qualifications

- Master of Public Policy and Administration, University of Massachusetts Amherst
- Bachelor of Arts degree in Political Science and Sociology, Illinois Wesleyan University
- Recipient of the federal government's prestigious Presidential Management Fellowship
- Former trustee of Illinois Library Association, Reaching Across Illinois Library System, and Fremont Public Library District
- Professional experience in program evaluation, grants management, and policy assessment in federal, regional and state-level offices



DAN ARMSTRONG, PRINCIPAL CONSULTANT, COMMUNICATIONS

Dan is co-principal of the firm and leads its communications services work. He is a trained librarian and skilled information professional with over a decade of experience leading communications and community engagement efforts for educational and nonprofit organizations. His work includes substantial experience in developing and implementing public relations, community engagement, and social media strategies.



Key Qualifications

- Master of Library and Information Science, Dominican University
- Bachelor of Arts in English-writing and Sociology, Illinois Wesleyan University
- Professional experience in higher education and social services nonprofit communications
- Began career in journalism, covering a broad array of topics
- Seven years as director of communications for nationally recognized K-12 school district
- Numerous statewide awards for writing, publication design, and multimedia production
- Guest speaker in secondary and college courses and Cub Scout leader



SUMMARY OF QUALIFICATIONS AND RELEVANT EXPERIENCE

OUR APPROACH TO STRATEGIC PLANNING

Sarah Keister Armstrong + Associates, LLC is a small, family-owned business that specializes in needs assessments and strategic planning, program evaluation, and communications for public libraries and nonprofit organizations. We embrace data and its value to telling an organization’s story, communicating its impact, and identifying ways to improve upon its work. We understand the challenges facing today’s libraries and excel in helping track the evolution of expectations between libraries and the communities they serve.

We believe it is essential that libraries have a focused understanding of the roles they play within their industry and communities they serve. Like other mission-driven organizations, libraries will be most successful when they maximize their relevance to their stakeholders. Thoughtful engagement with stakeholder groups and analysis of available data will guide the development of useful planning tools to support their missions and reflect the needs of those they serve.

Our approach to project management

- actively engages those meaningfully influenced by the project
- includes regular communication with project leads, and
- results in high-quality products that help organizations chart meaningful progress for the future.

Our philosophy as a firm is to be **lean, results-focused, efficient, and effective for our clients.** In working with public and nonprofit institutions, we maintain a strong commitment to **fiscal responsibility and accountability** to the stakeholders of the organizations we assist. We examine all aspects of projects through an **equity lens.**

Our inclusive approach strives to engage all parts of the stakeholder community as active participants in the process. To do so, we advocate using modern communications tools and innovative strategies, rather than top-heavy and expensive methods often recommended by larger and less nimble firms.

In projects such as these, we work not only for the organization but also on behalf of its stakeholders, facilitating a process that truly serves all. In working with public and nonprofit organizations, we tailor our services to the needs, desires, and philosophies of each organization.






QUALIFICATIONS

We have a strong track record of success in helping libraries accurately gauge their communities' desires and strategically craft responsive plans, goals, and evaluation metrics. Since incorporating in Illinois in 2013 (known as Turks Cap Consulting until 2016), SKA + Associates has completed dozens of actionable projects in a variety of fields, including strategic planning, program evaluation, needs assessment, grant writing and planning, and communications strategy and implementation.

The success of our work stems from our ability to design customized tools and processes, effectively implement them, and synthesize data intended to inform decision-making. This end-to-end servicing of client needs reflects our philosophy of working with clients to meet their needs rather than for clients using pre-packaged tools and methods.

We're proud to have led a number of successful assessment and strategic planning projects for public libraries with the belief that when their operations are aligned with identified needs, libraries can add tremendous value to the lives of their customers and communities. Our work collecting, analyzing, and communicating data-driven recommendations result in straightforward, dynamic documents that produce actionable results.

 **Key strengths** we bring to strategic planning that would effect a meaningful impact on the Northbrook Public Library's upcoming strategic planning project include:

- Deep familiarity with the core purposes of public libraries and their evolving roles within the communities they serve;
- Capacity to incorporate multiple methods of stakeholder engagement;
- Organized and timely project management, customized to the needs of our clients;
- Ability to effectively engage, challenge, and bring together organization stakeholders;
- Ability to facilitate discussion within a welcoming environment that encourages open conversation, thought processes, and progress;
- Experience facilitating library strategic planning alongside and in collaboration with EDI committees;
- Familiarity with the role of initiatives that further environmental sustainability work within the strategic planning process;
- Substantial experience working with mid- and large-size suburban Chicago libraries;
- Trustee experience at local, regional, and statewide library organizations in Illinois; and
- Foresight to connect implementation strategies and evaluation metrics with a newly created strategic plan.



Selected clients include:

- Addison Public Library, Addison, IL
- American Library Association, Chicago, IL
- Arlington Heights Memorial Library, Arlington Heights, IL
- Burlington Public Library, Burlington, WI
- Chicago Brewseum, Chicago, IL
- Cicero Public Library, Cicero, IL
- City of Glendale, Glendale, WI
- Community Action of Skagit County, Mount Vernon, WA
- Cook Memorial Public Library District, Libertyville, IL
- Deerfield Public Library, Deerfield, IL
- Delafield Public Library, Delafield, WI
- Dorchester Seniors, Summerville, SC
- ElderCare Lake County, Waukegan, IL
- Glencoe Public Library, Glencoe, IL
- Grayslake Public Library District, Grayslake, IL
- Hillside Public Library, Hillside, IL
- Jacksonville Public Library, Jacksonville, IL
- Shalom Austin Jewish Family Service, Austin, TX
- Lake Forest Public Library, Lake Forest, IL
- Lake Geneva Public Library, Lake Geneva, WI
- Le Mars Public Library, Le Mars, IA
- Lincolnwood Public Library, Lincolnwood, IL
- Linda Sokol Francis Brookfield Library, Brookfield, IL
- Maine Humanities Council, Portland, ME
- Matteson Area Public Library District, Matteson, IL
- McHenry Public Library, McHenry, IL
- Messenger Public Library, North Aurora, IL
- Mukwonago Public Library, Mukwonago, WI
- National Stuttering Association, New York, NY
- New Lenox Public Library, New Lenox, IL
- New Jersey Council for the Humanities, Camden, NJ
- Pekin Public Library, Pekin, IL
- Richton Park Public Library, Richton Park, IL
- Round Lake Area Library, Round Lake, IL
- Stillwater Public Library, Stillwater, MN
- South Milwaukee Public Library, South Milwaukee, WI
- Warrenville Public Library, Warrenville, IL
- Zion Benton Children’s Service, Zion, IL

We also regularly present and write on data collection, community engagement, and strategic planning to professional audiences and conferences, including the following:

- *Statistics for Nonprofit Professionals: Making Informed Decisions for Your Organization*
Presentation, Nonprofit Learning Lab, March 2023
- *Creating Effective Surveys*
Presentation, Wisconsin/Illinois Library Users Group, June 2022
- *Embracing Strategic Planning as a Community Engagement Tool*
Presentation, Nonprofit Learning Lab, Aug. 2021
- *Using Data for Storytelling: Data for Driving Strategy & Measuring Impact*
Panel Presentation, Forefront and the Association of Consultants to Nonprofits, Feb. 2021
- *Embracing Strategic Planning as a Community Engagement Tool*
Presentation, Lead the Way: Libraries at the Heart of Community Engagement, Nov. 2020
- *Strategic Planning for Small & Rural Libraries*
Presentation, Illinois Heartland Library System, July 2019
- *Engaging Your Board, Staff and Community in Strategic Planning*
Presented during the Wisconsin Library Association Trustee Training Week, Aug. 2017
- *Advocacy from the Top: Spring Your Board to Action*
Presentation at the Michigan Library Association Annual Conference, Oct. 2017



WORK PLAN

The proposed scope of work includes three stages:

1. Data Collection + Assessment (July – October 2023),
2. Strategic Plan Creation (November 2023 – January 2024), and
3. Implementation + Evaluation Plan (February 2024).

STAGE ONE: DATA COLLECTION + ASSESSMENT

The primary objective of the first stage of the strategic planning project is to gather and analyze data, stakeholder input, and emerging research to help inform the development of the strategic plan during the second stage of the project.

TYPE OF DATA	DATA COLLECTION METHOD
Preliminary Background	Research and data gathering
Board of Trustees	Individual interviews or survey; representation on planning team
Staff	Survey; representation on planning team
Community Leaders	Listening sessions
Community Residents	Survey(s)

We will lead the design of this project stage to answer the following areas of inquiry:

1. What are the strengths that the board and staff can leverage for continued success?
2. Where do gaps in exist within current library resources, programs, and services that are within the purview of the library’s mission and vision?
3. Where do gaps exist in community services that the library may have a role in filling?
4. How can library services be effectively structured to those in unserved and underserved communities within the service area of the Northbrook Public Library?
5. What role do community members envision for the library in a post-COVID world? Do gaps exist within community services since COVID that the library can fill?
6. What barriers prevent residents from maximizing their use of the library?
7. What communication methods and messages best suit the furthering of the Northbrook Public Library’s mission?



→ STAGE ONE SPECIFIC ACTIVITIES

PRELIMINARY DATA ANALYSIS

Effective analysis of the community served by the library and the role the library plays within it will provide us with context as we begin soliciting input from community stakeholders. This process also will include a thorough review of background information, best practices, and current successes and shortcomings to help envision the environment in which the library should expect to operate during the time period of its next strategic plan.

A **trend analysis of library usage** will be conducted using patron counts, circulation statistics and any other available and relevant library usage data. This information, in addition to a **demographic study**, will be used to create a community profile of the library's service area. Secondary data will be collected from external data sources, such as the U.S. Census Bureau and the Illinois State Board of Education.

The collected data will include commonly referenced demographic characteristics, such as age, income, school lunch data, language, educational attainment, and employment. Longitudinal trends, as well as relevant population growth projections, will be analyzed to understand where any significant demographic change exists.

In addition to this demographic study, we will incorporate data and findings from the following sources:

- EDI After Action Report; and
- Potential quantitative assessment being completed by Lily Zheng.

Understanding external opportunities and challenges will provide context to the input solicited from the groups of stakeholders listed below.

INFORMATIONAL INTERVIEWS WITH THE BOARD OF TRUSTEES

We propose conducting an informational interview with each member of the board of trustees, to solicit the input and perspectives they bring not only as residents of the library's service area, but also as community leaders. Interviews will solicit feedback about opportunities facing the library, threats to its future success, and aspirations for the future.



Findings will help inform a SOAR Analysis (Strengths, Opportunities, Aspirations, and Results), our preferred method analogous to a SWOT analysis, to be conducted with staff. If preferred by trustees, a written survey can be conducted in lieu of individual interviews.

SURVEY OF LIBRARY STAFF

We believe that staff are critical to the success of any strategic plan and should be engaged in the strategic planning process. Learning from staff about the strengths and weaknesses of the library, as well as aspirations for its future success, will provide context to develop goals and strategies that will move the organization forward.

We propose conducting a survey of library staff to identify and better understand the needs and desires of the community through the perspectives of library staff. The survey will include a variety of questions to solicit feedback about these unmet needs, gauge satisfaction with current library operations, and explore the potential for increased efficiencies and improvements. We recommend the survey be distributed in a convenient electronic format to maximize the availability to all staff, including those with part-time schedules.

LISTENING SESSIONS WITH COMMUNITY PARTNERS

To delve deeper into insights gleaned from survey and demographic analyses and to ensure deep engagement with key segments of the community, we propose conducting a series of two virtual listening sessions with representatives from organizations and institutions serving the Northbrook community. Examples may include:

- Village of Northbrook;
- Northbrook Park District;
- Northbrook Historical Society & Museum;
- Northfield Township;
- Rotary Club of Northbrook;
- Northbrook Chamber of Commerce;
- Friends of the Northbrook Library;
- Local public and private schools;
- Senior living facilities;
- Social service organizations; and
- Various faith-based organizations.

Deliberately soliciting this input will provide an opportunity to encourage productive conversation, spark realistic potential action steps and goals, and build community consensus about the library's potential role in serving unmet community needs. The library will lead outreach efforts to recruit and schedule listening session participants.



SURVEY OF RESIDENTS SERVED BY THE NORTHBROOK PUBLIC LIBRARY

To guide the development of the library's new strategic plan in a way that leads the library forward in a visionary manner and is responsive to the needs of its community, we propose a community survey.

A community survey will be designed to gauge not only residents' current use of the library, but also what is desired in future library service. The survey will be created following best practices and may contain questions including, but not limited to, those regarding use (and non-use) of the library; barriers to increased use of facilities, services, and programs; use of technology; space-related needs; and the library's collection.

Demographic questions such as age, household size, and educational attainment may allow for more detailed analysis of the community needs and usage of different segments of the population. Open-ended questions will provide respondents with opportunities to provide their own unrestricted feedback.

Survey Dissemination

Surveys will be administered via email using the library's existing email distribution list and also posted on the library's website and social media networks. If in alignment with newsletter distribution schedules, the library may wish to include promotion and/or tear-out surveys in its newsletter. We can provide recommendations regarding additional marketing and communications strategies to achieve high engagement and reach non-customers.

It is recommended that a nominal prize, such as gift card(s) to local restaurants, be offered by the library to attract attention to the survey and increase the response rate. *If offering prizes, SKA + Associates will furnish the cost of prizes up to \$300.* If desired, we also can facilitate additional means of survey distribution, such as direct mail promotion, for an additional fee. We encourage the following strategies for increasing reach to members of the community who may not access the survey directly through the library's communications channels:

- Physical copies of the questionnaire can be distributed to avoid alienation of residents who do not use computers or who would prefer to fill out a paper questionnaire rather than online;





- Physical copies of the survey and access to the online version also may be made available to local schools and community organizations for increased outreach to encourage participation in the survey by non- and infrequent customers of the library;
- SKA + Associates will provide a Spanish-language version of the survey and can work with the library for additional translations if needed;
- We encourage other community organizations to share the link to the online survey and promote it among their networks; and
- We can assist in identifying and connecting with organizations to assist in reaching members of the community who may be underrepresented or difficult to reach through the library's existing communication infrastructure, such as those serving immigrants, older adults, members of underrepresented communities, and individuals and families who are under-resourced.

This process will provide opportunities for the library to determine its strengths, its appeal, and which segments of the community may be underrepresented in library usage, as well as determining the most effective means of communicating with the community.

Survey Development and Collection Process

We recommend the following process for survey design, dissemination, and analysis:

1. Consultant discusses potential survey question topics with library administration and develops draft of the survey in online (e.g., using SurveyMonkey) and printable form.
2. Once finalized, library staff distribute the survey via library email distribution list, social media, and website and provide hard copies at various points of service within the library facility (circulation, youth area desk, etc.) and at community locations as applicable.
3. After the open survey period concludes, library staff will provide any hard copies of the survey to consultant.
4. Consultant will input and analyze data, compiled in a written report provided to library.



→ *STAGE ONE TIMELINE*

July – August 2023	Conduct preliminary data analysis and assessments. Conduct informational interviews with Board of Trustees. Conduct staff survey.
September – October 2023	Conduct community partner listening sessions. Conduct community survey. Develop and submit written report of findings to the Board of Trustees from the Data Collection + Assessment stage.

→ *STAGE ONE DELIVERABLES*

- Up-to-date community profile;
- Written report detailing the findings from each of the components of Stage One, including an executive summary of overarching trends.



STAGE TWO: STRATEGIC PLAN CREATION

The primary objective of this second stage of the strategic planning project is to develop a comprehensive strategic plan that identifies:

- The organization's mission, vision, and values; and
- Priority areas, strategies, and initial tactics that support their achievement.

→ STAGE TWO SPECIFIC ACTIVITIES

Please note: We recommend that the composition of the strategic planning team and/or participants of the sessions listed below include key staff and board members of the Northbrook Public Library. Ideally, seven to ten individuals will comprise this team.

FACILITATE PLANNING SESSION I

We will facilitate the first planning session with the library's Board of Trustees and staff representatives to develop goals that focus on the library's next steps within the next five years. This session will include a review of the Data Collection + Assessment stage and will prioritize:

- Review and potential draft revision of the organization's mission, vision, and values; and
- Consideration of the library's culture and its role in strategic planning.

FACILITATE PLANNING SESSION II

We will facilitate the second of the project's planning sessions to discuss the following:

- Review of any proposed changes to the organization's mission, vision, and values; and
- Priority areas, strategies, and initial tactics that support their achievement.

STAFF FEEDBACK

Following the development of the strategic plan draft, we recommend that all staff be given an asynchronous opportunity to provide feedback on the identified goals and strategies and/or input via their respective managers.

WRAP-UP SESSION

We will facilitate discussion with the Planning Team intended to build consensus around the content developed during the planning sessions, to prioritize the work of the Northbrook Public Library moving forward, and to develop an understanding of the resources necessary for fulfilling the actionable steps identified.





→ **STAGE TWO TIMELINE**

November 2023	Facilitate first planning session. Following the session, prepare and disseminate draft of strategic plan.
December 2023 – January 2024	Facilitate second planning session. Solicit library staff feedback to revise components of the strategic plan. Facilitate wrap-up session. Present final plan to Board of Trustees for approval.

→ **STAGE TWO DELIVERABLES**

- A comprehensive strategic plan, including an executive summary; and
- A detailed outline of next steps.



STAGE THREE: IMPLEMENTATION + EVALUATION

The primary objective of this third stage of the strategic planning project is to identify and plan for early actionable steps and to develop a foundation by which metrics and outcomes can be regularly evaluated throughout the duration of the strategic plan.

→ SPECIFIC ACTIVITIES

We will work collaboratively with Northbrook Public Library leadership to create a plan that identifies metrics and outcomes to be measured as the strategic plan progresses. These metrics will correspond to the measurable goals developed during the second planning session of the second stage of this planning project. We recommend that organizations adopt a system of creating annual goals and metrics to guide attention and accountability to the plan.

STRATEGIC PLAN	IMPLEMENTATION	EVALUATION
<ul style="list-style-type: none"> What is our mission? What are our values? What do we envision for our future? What are our immediate, short-term, and long-term goals? 	<ul style="list-style-type: none"> What actionable steps can we take to reach our identified goals? What resources will we need to take these steps? 	<ul style="list-style-type: none"> How can we show progress toward our goals? How will we know if we are successful?

→ STAGE THREE TIMELINE

February 2024

Develop an evaluation plan with key metrics to communicate progress of the strategic plan.

Submit finalized strategic plan documents to library administration.

*At no cost and at the option of the organization, we will re-engage with NPL at the conclusion of Year One of the plan to assist with assessment of success and setting of future metrics.

→ STAGE THREE DELIVERABLES

- Written evaluation plan that supports the priority areas identified in the strategic plan developed during Stage Two of this project; and
- Raw and summary data.





TIMELINE BY PROJECT STAGE

→ STAGE ONE TIMELINE: DATA COLLECTION + ASSESSMENT STAGE

- July – August 2023**
 - Conduct preliminary data analysis and assessments.
 - Conduct informational interviews with Board of Trustees.
 - Conduct staff survey.
- September – October 2023**
 - Conduct community partner listening sessions.
 - Conduct community survey.
 - Develop and submit written report of findings to the Board of Trustees from the Data Collection + Assessment stage.

→ STAGE TWO TIMELINE: STRATEGIC PLAN CREATION STAGE

These sessions are intended to be conducted in-person and can be conducted virtually or in a hybrid format if preferred.

- November 2023**
 - Facilitate first planning session.
 - Following the session, prepare and disseminate draft of strategic plan.
- December 2023 – January 2024**
 - Facilitate second planning session.
 - Solicit library staff feedback to revise components of the strategic plan.
 - Facilitate wrap-up session.
 - Present final plan to Board of Trustees for approval.

→ STAGE THREE TIMELINE: IMPLEMENTATION + EVALUATION STAGE

- February 2024**
 - Develop an evaluation plan and communications recommendations with key metrics to communicate progress of the strategic plan.
 - Submit finalized strategic plan documents to library administration.

*At no cost and at the option of the organization, SKA + Associates will re-engage with NPL at the conclusion of Year One of the plan to assist with assessment of success and setting of future metrics.





DELIVERABLES BY PROJECT STAGE

→ DELIVERABLES: DATA COLLECTION + ASSESSMENT STAGE

- Up-to-date community profile;
- Written report detailing the findings from each of the components of Stage One, including an executive summary of overarching trends.

→ DELIVERABLES: STRATEGIC PLAN CREATION STAGE

- A comprehensive strategic plan, including an executive summary; and
- A detailed outline of next steps.

→ DELIVERABLES: IMPLEMENTATION + EVALUATION STAGE

- Written evaluation plan that supports the priority areas identified in the strategic plan developed during Stage Two of this project; and
- Raw and summary data.





EXCLUSIONS OR EXCEPTIONS

We do not anticipate any exclusions or exceptions.

SCHEDULE OF COSTS

Sarah Keister Armstrong + Associates sets its fees as total project costs, which include labor, local travel, and materials used by Sarah Keister Armstrong + Associates. The total project cost of the approach and work schedule outlined above is not to exceed \$21,500, as delineated below:

PROJECT STAGE	PROJECT FEE
DATA COLLECTION + ASSESSMENT	\$9,500
STRATEGIC PLAN CREATION	\$9,000
IMPLEMENTATION + EVALUATION PLAN	\$3,000
TOTAL FEE	\$21,500

The project will be invoiced as follows: 30% at contract award and 40% at the completion of the Data Collection + Assessment stage, and 30% at project completion.





REFERENCES

David Archer

Cook Memorial Public Library District
Libertyville, Illinois
darcher@cooklib.org
847-362-2330

Michelle Krooswyk

New Lenox Public Library
New Lenox, Illinois
mkrooswyk@newlenoxlibrary.org
815-655-2526

Shirley Taylor

Le Mars Public Library
Le Mars, Iowa
shirley.taylor@lemars.lib.ia.us
712-546-5004

CONTACT INFORMATION

Sarah Keister Armstrong, Principal Consultant

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SARAH KEISTER ARMSTRONG

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EXPERIENCE

SARAH KEISTER ARMSTRONG + ASSOCIATES, LLC, Libertyville, Illinois

Principal + Owner, January 2013 – Present

Sarah Keister Armstrong + Associates, LLC has helped more than 60 public and nonprofit organizations plan for and sustain future operations. We specialize in:

- + Grantwriting
- + Strategic planning
- + Community needs assessments
- + Program evaluation
- + Communications

U.S. DEPARTMENT OF LABOR, Arlington Heights, Illinois

Program Analyst, 2011 – 2013

- + Awarded the Presidential Management Fellowship
- + Administered \$10 million federal grant program

RICHARD PAUL & ASSOCIATES, LLC, Vernon Hills, Illinois

Governmental Affairs Coordinator, 2008 – 2009

- + Managed government affairs for several Midwest professional associations

ILLINOIS STATE REPRESENTATIVE KATHY RYG, Vernon Hills, Illinois

Legislative Aide, 2003 – 2005

- + Coordinated legislative and constituent affairs for state representative office

PUBLIC SERVICE

LAKE COUNTY YES COALITION

Co-Chair, 2016 – Present

ILLINOIS LIBRARY ASSOCIATION

Director-at-Large, 2016 – 2019

REACHING ACROSS ILLINOIS LIBRARY SYSTEM (RAILS)

Board Member, 2014 – 2016

FREMONT PUBLIC LIBRARY DISTRICT

Vice President/Trustee, 2013 – 2017



EDUCATION

UNIVERSITY OF MASSACHUSETTS AMHERST

Master of Public Policy and Administration, Awarded 2011

ILLINOIS WESLEYAN UNIVERSITY

Bachelor of Arts, Political Science and Sociology, Awarded cum laude 2008

SELECTED PRESENTATIONS + PUBLICATIONS

EMBRACING STRATEGIC PLANNING AS A COMMUNITY ENGAGEMENT TOOL

Presentation, Nonprofit Learning Lab, Aug. 2021

USING DATA FOR STORYTELLING, Ask a Consultant Series

Panel, Forefront & The Association of Consultants to Nonprofits, Feb. 2021

EMBRACING STRATEGIC PLANNING AS A COMMUNITY ENGAGEMENT TOOL

Lead the Way: Libraries at the Heart of Community Engagement Conference, Nov. 2020

MORE THAN A NUMBERS GAME: BRINGING MEANING TO THE DATA IN GRANT APPLICATIONS

Published by GrantStation, Aug. 2020

STRATEGIC PLANNING FOR SMALL & RURAL LIBRARIES

Presentation, Illinois Heartland Library System, July 2019

SURVEY SAYS: WRITING QUESTIONNAIRES & AVOIDING COMMON PITFALLS

Presentation, Madison Nonprofit Day, Oct. 2017

ENGAGING YOUR BOARD, STAFF AND COMMUNITY IN STRATEGIC PLANNING

Presentation, Wisconsin Library Association Trustee Training Week, Aug. 2017

ADVOCACY FROM THE TOP: SPRING YOUR BOARD TO ACTION

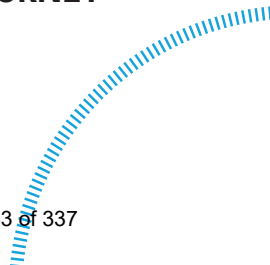
Presentation, Wisconsin Association of Public Libraries Conference, Illinois Library Association Annual Conference, and Michigan Library Association Annual Conference, 2017

FROM QUANTITY TO QUALITY: HOW LIBRARIES CAN UNEARTH THE MEANING OF THEIR DATA

Panel, Illinois Academic, Public, School & Special Libraries Conference, Oct. 2015

ARE WE THERE YET? FIVE STOPS ALONG A NONPROFIT'S JOURNEY THROUGH STRATEGIC PLANNING

Published by Nonprofit Information, July 2014



DAN ARMSTRONG

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EXPERIENCE

SARAH KEISTER ARMSTRONG + ASSOCIATES, LLC, Libertyville, Illinois

Principal + Owner, July 2021 – Present

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- + Grantwriting
- + Strategic planning
- + Community needs assessments
- + Program evaluation
- + Communications

HUNTLEY COMMUNITY SCHOOL DISTRICT 158, Algonquin, Illinois

Director of Communications & Public Engagement, Oct. 2014 – June 2021

- + Led successful rebranding, including change of name, visual identity and website revamp, leading to 93+% user satisfaction
- + Captured positive media placements in CNN, AP, *Parenting*, and *EdWeek*
- + Positioned senior administrators as thought leaders, leading to national awards and media appearances in *Wall Street Journal* and *New York Times*
- + Garnered Awards of Excellence in statewide National School Public Relations Association contest for annual reports and videos
- + Drove exponential growth in Facebook, Twitter and YouTube engagement

DOMINICAN UNIVERSITY, River Forest, Illinois

Digital Communications / Public Relations Manager, Aug. 2011 – Oct. 2014

- + Responsible for photography, video, social media, blogs and web content
- + Captured 2,100 media mentions/105 million media impressions in Year 1
- + Led interdisciplinary committee to create university's primary internal communications vehicle, Campus News, and served as its editor-in-chief

COMMUNITY RENEWAL TEAM, INC., Hartford, Connecticut

Communications Specialist, Jan. 2010 – May 2011

JAMES MADISON UNIVERSITY, Harrisonburg, Virginia

Media Relations Associate, Sept. 2008 – Dec. 2009



EDUCATION

DOMINICAN UNIVERSITY

Master of Library and Information Science, Awarded 2014

- + Coursework in Marketing, Fundraising and Advocacy, Management, and Internet Fundamentals and Design

ILLINOIS WESLEYAN UNIVERSITY

Bachelor of Arts, English and Sociology, Awarded magna cum laude 2008

- + Internships with Country Financial, local newspaper and IWU PR Office
- + News editor for student newspaper, The Argus

SOFTWARE, TECHNOLOGY + SKILLS

- + Advanced knowledge of AP Style
- + Graphic Design: Adobe CS – InDesign, Photoshop, Illustrator
- + Multimedia: Final Cut Pro, iMovie, Adobe Premier, Audacity
- + Web: WordPress and other CMS platforms, HTML and CSS
- + Microsoft Office: Word, Excel, Outlook, PowerPoint
- + Google: Docs, Sheets, Slides, Drive, Analytics

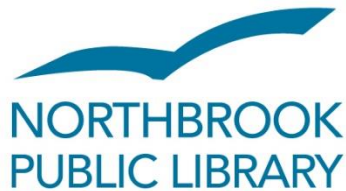
PROFESSIONAL DEVELOPMENT + SERVICE

- + Gale/Ed to Go A to Z Grant Writing Certificate, July 2021
- + Gale/Ed to Go Illustrator CS6 Certificate, May 2021
- + HubSpot Academy Social Media Marketing Certificate, March 2021
- + Completed FEMA ICS 100 and ICS 200 Emergency Response Courses
- + Member, Illinois School Public Relations Association
- + Member, Illinois Library Association
- + Guest speaker in numerous high school and college PR classes
- + Attendee, various Publicity Club of Chicago events
- + Former member, Public Relations Council of the Shenandoah Valley
- + Talk show host and sports broadcaster for IWU campus radio station

AWARDS + DISTINCTIONS

- + INSPRA Award of Excellence for Annual Report, 2018 and 2019
- + INSPRA Award of Excellence for Video Production, 2019
- + Public Relations Society of America Mercury Award for CRT website
- + 1st Place, national Community Action Works photo contest
- + Honorable Mention, Best Local News Coverage, Southern Illinois Editorial Association (South County News)
- + 2nd Place, Editorial Writing, Illinois College Press Association
- + Member, Sigma Tau Delta and Gamma Upsilon national honor societies





Memorandum

DATE: 4.13.23
TO: Trustees
FROM: Anna Amen
RE: FY2023 Capital Improvements & Debt Service Transfers

The Funds policy in the General Policy states: It is the goal of the library to maintain no less than four (4) and not more than twelve (12) months of operating expenses in the General Fund. General Fund balances over the minimum four (4) months at the end of the fiscal year may be transferred to the Capital Improvement Fund through Board of Trustees approval.

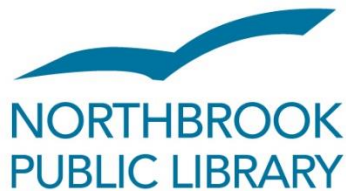
We are currently at 9 months in our fund balance. In the budget approved by the board last year, we had budgeted to transfer \$425,000 into the Capital Improvement Fund at the end of the year. Each year, the transfer is greater than budget due to the unexpended funds in the operating fund.

I would like to ask the Board for approval to transfer the budgeted and the surplus from the Operating Fund to the Capital Improvement Fund while keeping the fund balance in accordance with the policy.

MOTION: Approve the transfer of budgeted and surplus funds from the Operating Fund to the Capital Improvement Fund while keeping the fund balance in accordance with the policy during the fiscal year close process.

We also complete an annual transfer to the Debt Service Fund to cover the loss shown in Debt Service due to uncollected property taxes. The transfer of funds will take place in once the audit is completed for FY2023. This is budgeted to be \$25,000.

MOTION: Approve the transfer of the Debt Service fund net loss from the Operating Fund to Debt Service to cover the uncollected property taxes.



Memorandum

DATE: April 12, 2023

TO: Board of Trustees

FROM: Kate Hall, Executive Director

RE: Executive Director Review Process

Last year the board paused the update of the ED Review process at my request. The board did a modified process and agreed that the ED review should be tied into the strategic plan. As we do not yet have a new strategic plan in place, I am recommending the board do a modified process again this year.

Last year, I presented a summary of my work over the year including updates on my FY22 goals and presented FY23 goals. Laurie Prioletti presented feedback gathered from staff and shared area library director salaries.

The board discussed in closed session and then met with me to discuss my work and review FY23 goals.

I recommend the same process for this year. I will present a summary of my work over the past fiscal year along with updates on my FY23 goals and present on FY24 goals. Laurie will do a presentation again this year on staff feedback and area director salaries.

Once the strategic plan is completed, the personnel committee can continue their work and finalize the ED review process.

I look forward to hearing the board's thoughts and what direction you would like to take on this process.