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Monroe County  
Public Library

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**Strategic Plan  
2013-2017**

**Adopted by the Board of Trustees  
December 19, 2012**

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### **Strategic Plan**

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## Overview of the Strategic Planning Process

At a pivotal moment in the world of public libraries, the Monroe County Public Library set about creating a new strategic plan.

The library serves 138,000 residents of Monroe County, Indiana, home of Indiana University. The library provides service through a Main Library in downtown Bloomington, a branch in Ellettsville, and outreach services including Bookmobile, Homebound, Van, and Jail service. In addition to comprehensive library services, the library also hosts homework help, an active adult literacy program, and a community access television station with five channels.

The library enjoys strong community support and is consistently ranked among the top public libraries of its size in the country. In 2011, circulation exceeded 2.7 million items (ranked 15<sup>th</sup> in the nation in per capita circulation) and patrons made more than a million visits. The library supported nearly 220,000 public computer sessions. 61,599 people participated in 2,466 library programs and the library hosted 1,152 meetings of local community groups.

The library Board has taxing authority, limited by state law and review by County Council. In 2012, the library had an operating budget of just over \$7.6 million. In 2012, the library secured a three-year \$1.8 million general obligation bond that will help the library keep its facilities and technology current. At the same time, the state's property tax caps and slow recovery from recession will continue to impact the library's budget, resulting in unknown, but almost certainly tight funding.

During the next few years, the library anticipates rapid change in its operating environment:

- Dramatic changes in the publishing industry, as primary producers of books, music, and movies move toward digital distribution of content
- Dramatic changes in the telecommunications/information industry, as mobile devices become ever-more utilized in individuals' lives
- Significant changes in patrons' learning, information seeking, and entertainment behaviors
- Constrictions in funding and to the library Board's decision-making authority, as state government takes an activist role in local government control

The library saw the planning process as an opportunity to connect even more deeply to the community and involve stakeholders in a planning process that was big, fun and future-oriented. It contracted with Consensus, a consulting group based in Kansas City, to facilitate the process.

A complete record of the planning process from beginning to end, including a slide show of the community engagement event, is available at <http://www.monroe.lib.in.us/about/strategic-planning-2012>.

### ***A Community Steering Committee Guided the Effort***

The library convened a Strategic Planning Steering Committee to oversee the planning process. Many thanks to these community leaders representing the business, nonprofit, and education sectors, as well as Library Board and Friends of the Library, who reviewed information at every step of the planning and contributed valuable insights:

John Baumert, Friends of the Library  
 Kyla Cox, Indiana University Office of the Vice Provost for Undergraduate Education  
 Judith DeMuth, Monroe County Community School Corporation

Carol Gardiner, Richland-Bean Blossom Community School Corporation  
 Barry Lessow, United Way of Monroe County  
 Valerie Merriam, Monroe County Public Library Board of Trustees  
 Stephen Moberly, Monroe County Public Library Board of Trustees  
 Frederick Risinger, Monroe County Public Library Board of Trustees  
 Ron Walker, Bloomington Economic Development Corporation  
 Barbara Wilcox, Friends of the Library

Joining community representatives were nine library representatives, who formed the “core team” and led staff input, reviewed mountains of notes, and prepared and revised many, many drafts:

Ned Baugh, Information Services	Mickey Needham, Ellettsville Branch
Margaret Harter, Community Relations	Jane Ruddick, Collection Services
Chris Jackson, Community Outreach	Kyle Wickemeyer-Hardy, Human Resources
Sara Laughlin, Director	Josh Wolf, Children’s Services
Doris Lynch, Adult and Teen Services	

### ***The Library’s Futures Committee Set the Stage***

The library chartered a Futures Committee to study the future of library services. After some research, the Futures Committee formulated six questions:

- In ten years, what will the library’s core services be?
- How can libraries meet the challenge of promoting, delivering and discussing books with the community in the new era of e-books?
- Should the library become involved in the production, distribution and/or archiving of local content?
- What impact will new literacies have on library services?
- How will the library incorporate new technologies and services that will transform facilities from places where things are stored into spaces where community members are encouraged to work, create and build?
- Will the library’s role as a gathering space and community center become more central to our success?

The committee gathered information from staff members, conducted site visits to four digital creativity centers, attended conferences to hear library trend experts, and read books, articles, and research reports. The committee’s report, exploring possible answers to these questions, became input for the Future Search Conference.

### ***The Library Compared Well with Other Libraries of Similar Size***

Tom Hennen prepared a report that benchmarked the Monroe County Public Library against other Indiana libraries serving similar populations and against libraries across the nation ranked in the top 10 in the Hennen American Public Library Rankings. Because the latest data available was from 2008 (for HAPLR rankings) and 2009 for other rankings, just before many communities and libraries were hit by a recession, the report was of limited use for future planning, but nevertheless confirmed that the library has a record of performing well and is among the top tier of libraries in the country.

Hennen reported that, compared with its Indiana and regional peers in 2009, the Monroe County Public Library:

- Spent more per capita overall, more per capita on print materials, and less on print periodicals.

- Spent a higher percentage of its operating funds for materials than peers in the region and about the same as Indiana peers.
- Owned more print volumes.
- Had substantially more staff than peers, but spent less per circulation and had a higher circulation per hour and per FTE staff hour.
- Answered marginally more reference questions.
- Checked out substantially more items per capita and less per visit.
- Maintained a higher turnover rate – circulation per collection.
- Had a higher number of visits per hour.
- Had more public access Internet terminals per capita, hosted more public Internet sessions per capita and per open hour, and matched the Internet use per visit rate.

The full report is available at <http://www.monroe.lib.in.us/about/strategic-planning-2012>.

### ***Monroe County’s Population is Expected to Grow***

The library also researched population projections, which showed that Monroe County’s population will likely increase by 33 percent by 2050. While the largest age group will continue to be between 20 and 29 years old, the age group which will experience the largest increase is those 60 and older.

### ***The Library Future Search Conference Built Common Ground for Action***

What trends are likely to have the biggest impact on library services? What should the library look like years in the future? Over three days in May 2012, the library brought together a diverse mix of 61 community and staff members to answer these questions.

Penny Austin	Jason Evans Groth	Kathleen Plucker
Diane Ballard	Paige Halliday	Mary Jean Regoli
Katie Bannon	Deb Hutton	James Robinson
Erika Barnhill	Chris Jackson	Jennifer Robinson
Daniel Baron	January Jones	Howard Rosenbaum
Ned Baugh	Sara Laughlin	Rick Routon
John Baumert	Gary Lettelleir	Tom Saccone
Sarah Bowman	Jackie Lovings	Ellen Sieber
Kalynn Brower	Shaun McDermott	Paul Simacek
George'ann Cattelona	Geoff McKim	Paul Smedberg
Lisa Champelli	Valerie Merriam	Maggie Sullivan
Kenneth Childers	Miah Michaelsen	Diane Thayer
Talisha Coppock	Steve Moberly	Brad Thurmond
Tori Dillinger	Robert Moore	Gracia Valliant
Mary Ducette	Mickey Needham	Steve Volan
David Ernst	Jenny Noble-Kuchera	Jane Walter
Cathy Fuentes-Rohwer	David Nosko	Carol Weiss-Kennedy
Christine Friesel	Brian O'Neill	Josh Wolf
Thom Gillespie	Martin O'Neill	Charlotte Zietlow
Scott Gillie	Bobby Overman	
Paula Gray-Overtoom	Tina Peterson	

The Future Search Conference model relies on four core principles:

- Get the whole system in the room.
- Explore the whole elephant before seeking to fix any part.
- Focus on common ground and future action, not problems and conflicts.
- Have people self-manage their own groups and be responsible for action.

Together, participants explored the past, present and future. They created and analyzed a timeline of the past and a mind map of current trends. Then they developed future scenarios that represented their hopes for the library. The group developed the following common themes for action, stating them in terms of what the library has accomplished in the future:

1. 24/7 library. The Library has expanded access to library services in three ways:
  - Extended full-service library hours in response to patron demand.
  - Certain spaces (e.g. meeting rooms, performance areas) accessible after library hours.
  - Added offerings online.
2. Changing demographics. The library is a local resource for free information, providing access to increased and enhanced services to populations reflecting changing demographics, with special emphasis on multilingual, diverse, new, and underserved audiences.
3. Customer service. The library provides high touch services, as well as new, personalized services throughout the library.
4. Digital literacy. The library teaches and supports the learning of tools and skills for people to work and enjoy their lives in the digital world. The library adapts and adopts the models and techniques of traditional literacy teaching and learning to “digital literacy.” The library understands and treats digital literacy as workforce development.
5. Expanded marketing. The library seeks to carry out its mission by leveraging and extending its brand presence through community and customer engagement.
6. Funding. The library’s funding strategy is focused on supporting equitable and free access to information, technology, and services. Taxes continue to be a primary revenue source. The library uses innovative and diversified income-generating activities to support programming and capital needs, including public/private partnerships, development/fundraising, and grants.
7. Local Content. MCPL’s digital creativity lab offers space, tools and coaching to facilitate the development of original content. By tapping into the vibrant local community of artists, musicians, entrepreneurs and innovators, the library cultivates a new generation of content creators. The library, together with partners, is ideally positioned to take on the role of curating and presenting our unique culture and history.
8. Location and Space. The Main Library in downtown Bloomington is well-maintained, with flexible points of service and reallocate space for varied uses in response to community needs. The library also has satellite services and/or locations such as Bookmobile, branches, pop-ups or shared community locations.
9. Partnerships. The library actively partners with other organizations to address community needs. Partnerships leverage library expertise and resources and are mutually beneficial and locally focused. Partnerships can be ongoing, project-centered or event-based, e.g., to address solutions to transportation and parking or to provide resources and expertise to support education and nonprofit agencies.

10. **Programs.** The library offers a wide array of free multi-age, multi-generational, educational and entertaining programs which cater to the interests reflected in our county. The library often works in conjunction with local groups and agencies.
11. **Staff.** Library employees work in flexible, interchangeable and untethered teams to engage their evolving skills and capacities to support a diverse community in accessing and generating information through multiple modalities. As experts in process as well as content, library staff are able to “tell,” “show,” “guide practice,” and “coach,” according to customer needs.
12. **Sustainability.** The library is a model of sustainability for our community. LEED guidelines inform the process of greening the library. Areas of focus include energy efficiency, water savings, use of local materials, and improving indoor and outdoor environmental quality.

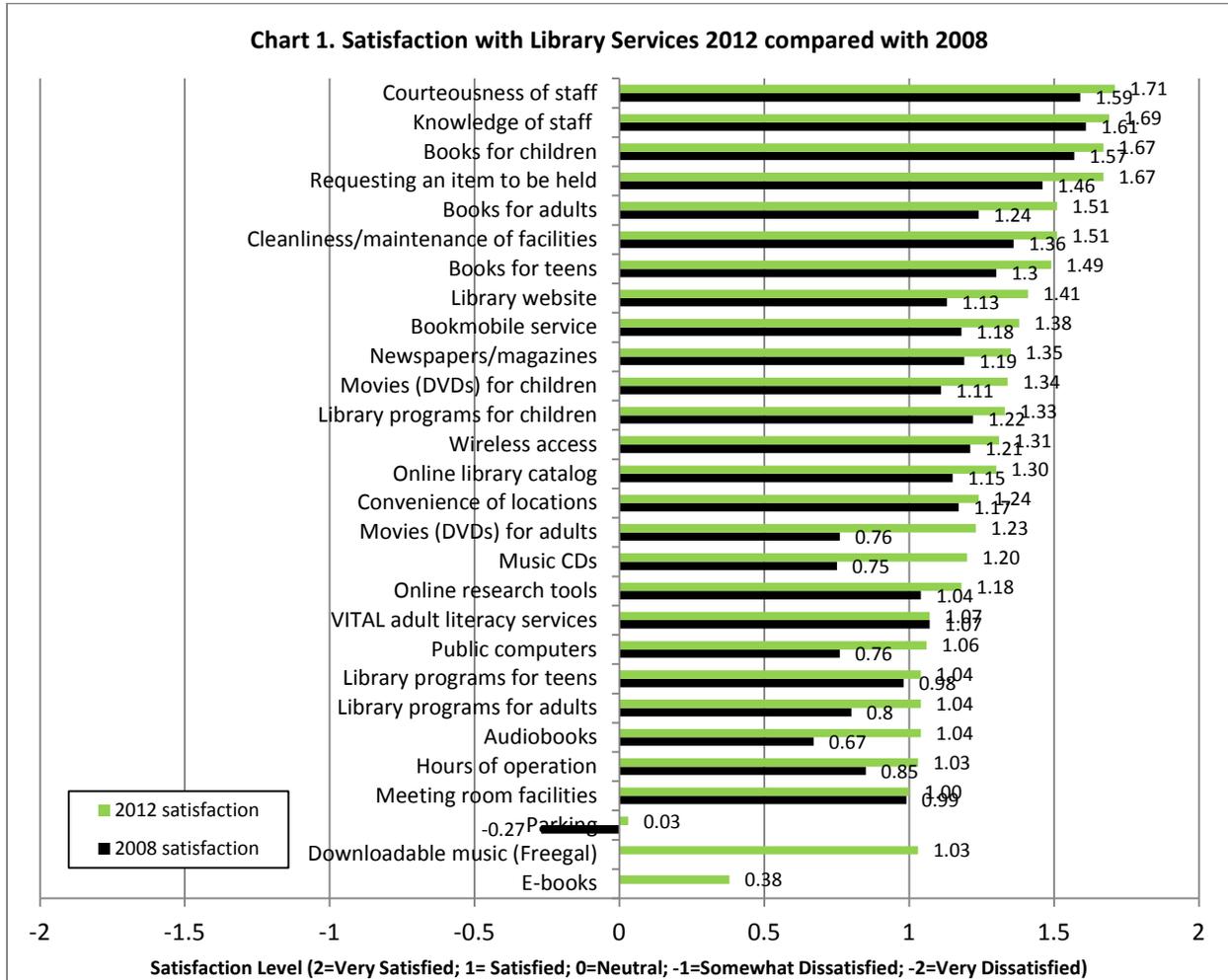
These 12 “common themes for action” provided the framework for discussion and the language for the goals and actions incorporated in the final planning document. The passion and the ideas from the Future Search Conference

### ***A Community Survey Drew a Strong Response***

Seven hundred forty-six county residents responded to a survey, which was mailed to 3,000 Monroe County households in August 2013. The survey asked about current use and satisfaction with library services and priorities for the future. Complete survey results are available at: <http://www.monroe.lib.in.us/about/strategic-planning-2012>.

Highlights from the survey:

- Satisfaction with current services has improved since the library’s 2008 community survey, with satisfaction ratings exceeding “somewhat satisfied” for all services except parking and e-books (Chart 1). Staff courteousness and knowledge received the highest ratings.
- 79% of community members believe the library is very important and an additional 18% believe the library is somewhat important to the future of the community (Chart 2).
- Thirty-nine percent of Monroe County households reported having at least one e-reader device; an additional 11% planned to purchase one by the end of 2012. The figures are more than double the national average of 19% with e-readers reported by a 2012 Pew Research report.
- Top roles for the library in the future were the traditional roles of “education and literacy” (73%), “resources for reading/viewing/listening” (45%), “source of free information” (41%), and “quiet place for reading and study” (38%). One of four respondents chose “help with technology tools” and “support for job seekers and workforce development” as top roles for the library in the next few years.
- Respondents also commented on what the library could do to improve. The most frequently mentioned comments suggested improving parking, addressing safety and civility, and focusing on physical collections and e-books.



***Library Staff Brainstormed Actions to Achieve Goals***

The library staff core team reviewed and discussed the results of Steering Committee, community, and staff input and drafted four goals – broad focuses of the library’s efforts over the next three to five years – and eight strategies – methods the library will use to reach the goals.

During Staff Day on October 10, every library employee had the chance to suggest specific, practical action steps the library could use to reach each goal. The core team then used the action steps to complete the strategic plan with action plans, and to assign responsibility, set a timeline, and identify desired outcomes and measures.

***The Library Board Approved the Plan and Submitted to the Indiana State Library***

After presenting the draft plan to the Steering Committee in early November, the core team made final revisions and presented the plan to the Board of Trustees for approval in December. Following approval, the plan was submitted to the Indiana State Library to fulfill one of the requirements in the Public Library Standards, was posted to the library’s website and shared widely.

## **MISSION**

The mission of the Monroe County Public Library is to enrich lives and strengthen our community by providing equitable access to information and opportunities to read, learn, discover, and create.

## **VISION**

An educated, engaged, curious, and creative Monroe County, with the library at its center.

## **VALUES**

Accessibility	Lifelong learning
Freedom of expression	Respect
Inclusiveness	Service
Integrity	

## **GOALS**

GOAL 1: Strengthen 21<sup>st</sup> century literacy skills.

GOAL 2: Provide shared access to the world's information for free.

GOAL 3: Provide high quality, personalized customer service.

GOAL 4: Optimize stewardship of library resources.

## **STRATEGIES**

- A. Market research and promotion to engage customers
- B. Staff development (process as well as content knowledge)
- C. Clean, safe, comfortable, and energy efficient facilities
- D. Technology
- E. Free educational and entertaining programs
- F. Active partnerships
- G. Collections/resources
- H. Continual improvement of library processes

## **GOAL 1: Strengthen 21<sup>st</sup> century literacy skills.**

### **1A. Strengthen early literacy skills.**

- i. Furnish expanded Learn and Play Space
- ii. Incorporate “Every Child Ready to Read” concepts into training, collections, programs, spaces, and messages.
- iii. Launch parent support groups.
- iv. Develop programs for parents with infants.
- v. Present literacy programs for low-income children.
- vi. Add children's library programs to CATS website for streaming.

### **1B. Support basic literacy skills.**

- i. Design and present multi-sensory programs which are welcoming to all, including people with disabilities.
- ii. Develop programs and services for non-English speakers.
- iii. Support literacy efforts by developing digital audio and video content.

### **1C. Serve as a community resource for digital literacy.**

- i. Continually expand staff technology mastery to support technology literacy.
- ii. Partner with schools to promote literacy and technology skills.
- iii. Integrate digital literacy into program content.
- iv. Continue one-on-one sessions on digital literacy topics.
- v. Expand CATS web content to include technology literacy programs.
- vi. Enhance the coordinated initiative (programs, resources, and one-on-one support) for job search and career development, with community partners.

**1D. Support digital creativity.**

- i. Develop staff technology mastery to support digital creativity.
- ii. Create defined space for digital creativity and collaborative work during Main Library renovation.
- iii. Develop "maker space" workshops for building things and creating projects collaboratively.
- iv. Develop digital creativity learning experiences.

**1E. Maintain collections to meet current needs, adding new formats and removing obsolete formats.**

- i. Prepare employees to support patron use of collections in new formats.
- ii. Continue to investigate and experiment with e-content delivery systems.
- iii. Improve access to, availability of, and satisfaction with e-books.

**GOAL 2: Provide shared access to the world’s information for free.**

**2A. Provide programs for adult and teens.**

- i. Continue quarterly schedule of programs for adults and teens.
- ii. Support and encourage continued participant conversations after programs to deepen impact.
- iii. Update adult and teen programming philosophy.
- iv. Implement program evaluation for every program and location.

**2B. Increase community awareness and engagement with the library.**

- i. Develop an e-newsletter.
- ii. Coordinate social media content across the library’s platforms.
- iii. Increase awareness and use of online databases.
- iv. Improve awareness and promotion of CATS programs.
- v. Expand cooperation with WFHB community radio on news, public affairs, and music programming.

**2C. Strengthen services for nonprofit organizations.**

- i. Update and refurbish Main Library meeting rooms.
- ii. Continue partnership with United Way of Monroe County, Nonprofit Alliance of Monroe County, and IU-SPEA to present programs.
- iii. Update and increase use of community organization file.

**2D. Continually refresh web content and improve usability based on principles of user-centered design.**

- i. Develop mobile access for a variety of library services.
- ii. Create integrated access to content across formats.
- iii. Increase web access to CATS educational and cultural program content.
- iv. Digitize and curate local content and promote use by targeted audiences.
- v. Investigate expanding curation of local content to include locally produced creative works
- vi. Digitize essential CATS archive content.

**2E. Increase technological infrastructure capacity to support increased digital focus.**

- i. Upgrade phone systems at Main Library and Ellettsville Branch.
- ii. Implement recommendations from 2012 technology audit.
- iii. Upgrade CATS signal path to HD.
- iv. Work with governmental partners to upgrade their CATS origination facilities to HD.

**GOAL 3: Provide high quality, personalized customer service.**

**3A. Provide quality customer service to increasingly diverse audiences.**

- i. Recruit and retain quality employees.
- ii. Provide orientation, ongoing training, and support to ensure quality customer service.
- iii. Prepare staff to represent the library effectively in the community.
- iv. Develop an employee mentoring program.
- v. Coordinate efforts to strengthen services for people with disabilities.
- vi. Take a leading role in promoting a community focus on civility.

**3B. Develop a unified communication strategy.**

- i. Develop common messages about the value of library services to use across platforms, departments, etc.
- ii. Regularly involve community members in assessing needs to determine service priorities.
- iii. Regularly seek feedback from partners.

**3C. Position auditorium as a valued local performance venue.**

- i. Explore use of auditorium by the community after library hours.
- ii. Renovate library auditorium as part of Main Library renovation.

**GOAL 4: Optimize stewardship of library resources.**

**4A. Recruit and retain quality employees.**

- i. Explore new staffing models to support library goals.
- ii. Support staff wellness efforts.
- iii. Complete review of employee benefits.
- iv. Improve internal communications processes.
- v. Provide self-service tools for employees to access their personal information.
- vi. Regularly seek feedback from employees.
- vii. Develop processes to support idea sharing and innovation and implementation of ideas.

**4B. Assure adequate, stable funding for library operations.**

- i. Sustain tax support for library operations.
- ii. Encourage and support the Friends of the Library.
- iii. Expand non-tax revenues.
- iv. Renew general obligation bond for capital expenditures.
- v. Plan and secure funding and site for a new facility to provide convenient access to growing community.

**4C. Maintain library facilities.**

- i. Complete third phase of Main Library renovation.
- ii. Reduce energy costs and improve sustainability.
- iii. Implement landscaping design at Main Library and Ellettsville Branch.
- iv. Investigate adding additional pick-up and drop-off sites in the community.
- v. Reconfigure Ellettsville Branch to improve circulation desk area, reference desk, and teen area.

**4D. Improve stewardship of library assets and records.**

- i. Complete disaster plan and crisis communications plan and prepare all persons-in-charge to carry out.
- ii. Update maintenance and replacement schedule for facilities, equipment, furnishings.
- iii. Develop and implement records retention schedule to comply with state and local regulations and meet library needs.
- iv. Update maintenance and replacement schedule for technology.
- v. Implement backup plan for key business data - patron and circulation data, HR data, financial data, CATS data
- vi. Update the library's strategy for collecting and displaying art.