

2015-2018 Crandall Public Library Strategic Plan

Acknowledgements

The 2015-2018 Strategic Plan for Crandall Public Library was jointly created by a committee of Library Trustees, Library Staff, Stakeholders, and Community Leaders with special credits to consultants: Leslie Kendall, Libby Post and Susan Weinrich. Their respective expertise in organizational development, libraries, and non-profits greatly contributed to the integrated structure of this guiding document. The bright future of Crandall Public Library would not be possible without the aforementioned efforts and thoughtful contributions. Many thanks.

Kathleen U. Naftaly
Director, Crandall Public Library



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Guin Forshey, Librarian III, Innovation and Patron Experience
Kathleen U. Naftaly, Director, Crandall Public Library (ex-officio)
Lynn Shanks, Development Director
Justin Spraragen, Computer Assistant, IT
Julia Stuckman, Librarian I, Children's

Vision and Mission Committee

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Tala Henry-Halabi, Library Assistant
Megan Johnson, Board of Trustees
Kathleen U. Naftaly, Director
Catherine Schmitt, Friends of CPL
Lynn Shanks, Development Director
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Executive Summary

The library card is a passport to wonders and miracles, glimpses into other lives, religions, experiences, the hopes and dreams and strivings of ALL human beings, and it is this passport that opens our eyes and hearts to the world beyond our front doors, that is one of our best hopes against tyranny, xenophobia, hopelessness, despair, anarchy, and ignorance.

—Libba Bray

Google can bring you back 100,000 answers, a librarian can bring you back the right one.

—Neil Gaiman



These quotes from influential contemporary authors, Libba Bray and Neil Gaiman, deftly illustrate the time-honored essence of public libraries and librarians. Libraries are all-inclusive, librarians are considered authorities and the combination of the two is a community's foundation. By adopting this Strategic Plan, the Board of Trustees is affirming the goals and objectives presented in this plan and the Library's continuing role in a grand tradition.

The outcome of this strategic planning process is traditional in the sense that the strategic plan contains goals, objectives, and measurable outcomes; however, its genesis is non-traditional established on both numeric analysis and ethnographic methodologies. Instead of basing our



work solely on the classic Public Library Association model Strategic Planning for Results¹ our task has been to create a plan based on pillars of quantitative and qualitative measurement. It retains the older arrangement of goals, objectives and measure.

Methodology and Approach

The first step in our planning process was to offer a “Request for Quote” for professional assistance to facilitate our strategic planning process. From the respondents *Kendall & Associates* was selected. As stated in the firm’s Executive Summary:

The primary role of *Kendall & Associates* was to provide the PriorityPath® Analysis, a cause-effect methodology with proprietary software designed to identify and prioritize stakeholder input regarding potential obstacles to mission success (p. 1).

The logic embedded in this statistical analysis enabled the Strategic Planning Committee to understand and focus on the overriding, ranked concerns of Library stakeholders. In turn, this algorithmic spotlight aided the Board of Trustees and Staff to apply resources to specific tracks. The five major categories intimately tied to the Library’s institutional success were determined to be (unranked): 1) difficulties associated with organizational practices, 2) deficiencies associated with the public’s awareness of Library programs and services, 3) deficiencies associated with customer service and communication, 4) deficiencies associated with technology, and 5) difficulties associated with safety, security, and loss.

All five of these major categories have be thoroughly integrated into the Strategic Plan and addressed in terms of their relevance to training, marketing, budget planning, etc.

For a further understanding of the methodology and results of the study see Appendix A: Crandall Public Library Strategic Planning Process: Final Narrative Report: Executive Summary, Data Findings, and Recommendations.

Ancillary to the strategic planning process was a grant funded project to gather information from the community, staff, Friends of Crandall Public Library and the Board of Trustees to devise a brand for the Library. The Library solicited a Library Branding Proposal from marketing/advertising/graphic design firms to create a new identification for the Library.

¹ Nelson, Sandra S. *Strategic planning for results*. Chicago : American Library Association, 2008.

The goal was to create a deeper attachment with current patrons and to capture the imagination of non-Library users by creating a clear and concise message. *Communication Services* secured the contract.

Communication Services held a series of focus groups that touched all manner of Library constituents and produced a qualitative report that highlighted strengths (of which there were many) and weaknesses (of which there were few) of the organization. The outcomes from the PriorityPath® Analysis were quantitative, negative and stringent and the information derived



from the branding focus groups was qualitative, positive and flexible. Therefore, discoveries from the branding project provided a good foil for the results of the PriorityPath® study. For a full report see [Appendix B: Crandall Public Library Branding Report](#). Although the process did produce a logo and tag-line for Crandall Public Library we realized that it would be premature to launch any branding strategy without completion of the Strategic Plan.

The final major component embedded in this plan was data produced from the January 22, 2015 Crandall Public Library Board of Trustees retreat facilitated by the New York Council of Nonprofits (NYCON). Information from both *Kendall & Associates* and *Communication Services* was distilled into a concise summary of results that was then used as a catalyst for the Board of Trustees to discuss strategic issues, organizational capacity, programs and services and the next steps. For the summary of the meeting see [Appendix C: Crandall Public Library Board Retreat Summary](#).

At the retreat, it became very clear that we needed to update our vision and mission statements before we could draft a reasonable plan forged from the collected data and associated anecdotes. On March 10, 2015 with guidance from facilitator, Libby Post of *Communication Services*, the Vision and Mission Committee thoughtfully and deliberately parsed a lot of data into two clear and concise statements. The definition of vision includes: 1) an organization's impact upon the world, 2) an organization being future focused, 3) an organization being where it wants to be and, 4) an organization being what it wants to be; whereas, an organization's mission is based on: 1) what is to be accomplished, 2) what it wants to do and, 3) why it exists and for what purpose.

Vision and Mission

Vision: Crandall Public Library will cultivate a forward-thinking community that pursues knowledge, embraces inclusion, inspires creativity and values civic responsibility.

Mission: Crandall Public Library creates programs and services to educate, enrich and encourage our thriving community.



Crandall Public Library Strategic Focus

Goal #1 Crandall Public Library is the Community's Sanctuary

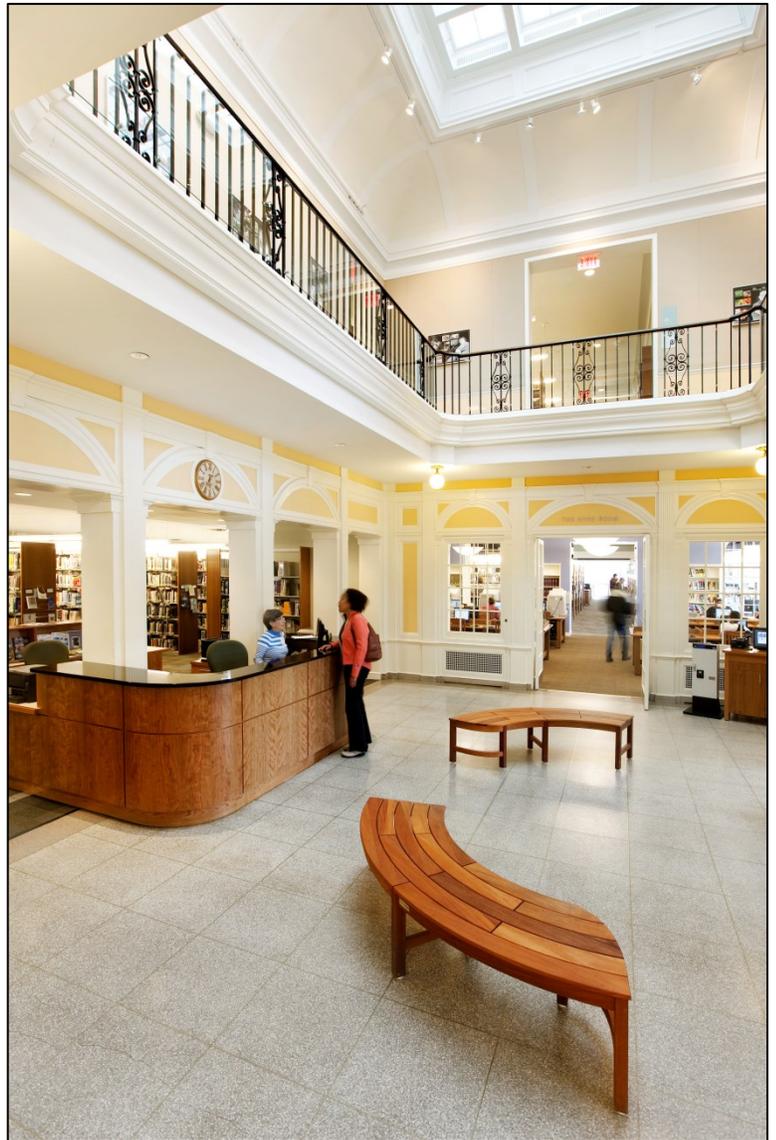
Objective 1: Provide a welcoming environment

Actions:

1. Through a shared understanding of service excellence treat patrons and staff with respect and dignity.
2. Project a warm and welcoming tone.
3. Create an interior where beauty and vitality meet.
4. Library patrons and staff will be at ease.

Performance benchmarks:

- A. Customer service training will be offered annually to staff with a 95% participation rate.
- B. 100% of supervisors will receive training in managing human resources.
- C. Supervisors will increase emphasis on staff interpersonal interactions on annual evaluations so that by 2018 100% of evaluations will meet or excel expectations.
- D. Library bylaws will establish an ad hoc Trustee and staff committee by 2017 to annually review the facility's artistry and ambience.
- E. 100% of adjustments to the facilities' building features and furnishings will be in keeping with the American Disabilities Act and the ergonomic and physical comfort for all.



Objective 2: Ensure safety and security

Actions:

1. Reduce the amount of disruptive behavior from individuals and/or groups at the Library.

Performance benchmarks:

- A. 100% of staff will have immediate authority to contact security personnel or local police to interrupt or stop illegal or disruptive activities.
- B. Maintain positive relationships with local policing organizations including but not limited to the Glens Falls Police and the Warren County Sheriff so that there is continuing cooperation between the Library and policing organizations.
- C. Annually review and update the Library budget to reflect line items related to the safety and security including but not limited to security personnel, equipment, and training.
- D. Severity of recorded incidents will diminish annually.

Objective 3: Maintain facility

Actions:

1. Facility managers will adhere to best practices in maintaining a clean, well-apportioned building and its grounds.
2. Capital funds may be utilized as necessary to repair or update infrastructure.

Performance benchmarks:

- A. 100% of supplies and equipment will be purchased in conjunction with NYS PESH guidelines and the ergonomic and physical comfort of patrons, staff and volunteers—some exceptions may apply.
- B. Non-toxic, environmentally friendly cleaning products will be used at least 90% of the time.
- C. Annual budgets will reflect sufficient personnel, supplies and equipment to maintain year-round attractiveness and efficiencies.
- D. Costs for upgrades and replacements (hardware and software) for the infrastructure of the Integrated Library System and Self-Check Systems/AMH (Ill/Polaris/Bibliotheca) will be anticipated for and scheduled for up to 5 years before implementation.



Objective 4: Improve access to resources.

Actions:

1. Continue to provide Outreach services to the homebound.
2. Enhance acquisition and distribution of electronic resources.
3. Overcome barriers for those who are unable to come to the building due to fiscal, emotional, or other issues.
4. Initiate feasibility studies for a North Queensbury branch and/or a Moreau branch library.

Performance benchmarks:

- A. Based on annual surveys of our Outreach participants they will report a 90% satisfaction rate for services rendered.
- B. Allocate resources within collection development, and marketing to grow circulation of our electronic materials from about 6% of total monthly circulation in the Spring of 2015 to 10% by late 2018.
- C. Enhance services to Library District patrons and omit barriers to access by establishing a pilot Library-By-Mail project in late 2015 or early 2016 called *The Extra Mile* with at least a 2.5% participation rate by District cardholders and 80% of patrons report satisfaction with the program.
- D. Determine a reasonable ROI for possible branch implementation by December 31, 2018.

Goal #2 Crandall Public Library is a Place of Education and Enlightenment

Objective 1: Establish the Library as the primary regional resource for information and life skills training including parenting, education, finances, health, and aging etc.

Actions:

1. Use community interests and borrowing patterns (see Initiative #3, Goal 1) to inform collection development strategies.
2. Allocate resources towards programs that support life-long learning.
3. Provide mentoring opportunities for staff and members of the Board of Trustees to develop skills and expertise in Library concerns.

Performance benchmarks:

- A. Based on an annual survey 90% of respondents will report that Crandall Public Library's materials meet their needs.
- B. 100% of Library programming will reflect the community's life-long learning interests as indicated by program specific surveys or annual surveys.
- C. 80% of the Board of Trustees will participate in yearly trustee training.
- D. Every year 100% of professional and paraprofessional Library staff will be required to participate in collection development and acquisitions education.

Objective 2: Enhance the value of the Library as a community center.

Actions:

1. Use the Library's resources to emerge as a forum for open civic discourse.
2. Partner with other organizations and businesses to offer varied programs.

Performance benchmarks:

- A. From 2015 through 2018 there will be at least two collaborative or Library sponsored programs devoted to broadening community knowledge of key topics of national discourse, such as, climate change, economic development, and globalization there by creating emotionally safe spaces for the community to discuss passionate topics. [see as an example: [National Issues Forum](https://www.nifi.org/)]²
- B. Establish updated guidelines for Public Meeting Room Policy and Room Registration by 2017 to broaden educational opportunities for our community.



Objective 3: Crandall Public Library will provide a dynamic link between past, present and future.

Actions:

1. The Folklife Center will continue its mandate to document, preserve and interpret multiple facets of cultural history and homespun narrative.
2. The Library will continue to function as a repository and a distributor of the human experience.
3. Library programs and services will serve as a catalyst for human imagination and creation



² National Issues Forum <https://www.nifi.org/>

by providing contact with a broad world of ideas and objects ranging from the sciences to the arts.

Performance benchmarks:

- A. The Folklife Center will develop programs, services and space by 2018 to encourage and teach individuals, families, and, businesses and non-profits, to capture and preserve their heritage using modern technologies.
- B. Materials and electronic acquisitions will remain all about “the word;” books, lyrics, dialog, scripts, etc. will be our core regardless of format as measured yearly in reports generated by Polaris, Collection HQ, electronic resources, etc.
- C. Programming in the Children’s and Teen Departments will be linked with STEAM integration in local schools.

Goal #3 Crandall Public Library is a Communications Hub

Objective 1: Continuously assess the needs and desires of our community as they relate to Library services.

Actions:

- 1. Schedule opportunities for public and self-assessment of Library performance.
- 2. Provide access to technologies unavailable to patrons in their daily lives.

Performance benchmarks:

- A. Offer the community multiple formats such as online surveys, community forums, and social media to give the Library feedback on our operations at least four times per year.
- B. Establish a Community Advisory Committee by 2017 as a third feedback loop for information in addition to the Board of Trustees and the Friends of the Library Board.
- C. Supply on-site access to free Wi-Fi and/or computer connections to that could be available to 100% of the local population.



Objective 2: Market Library services to the community

Actions:

- 1. Target generational groups such as young families and teens (Generation Z), Millennials, Generation X, Baby Boomers and the Greatest/Mature/Silent Generation to inform them of specific programs and services.

2. Review departmental marketing strategies and form a cohesive marketing plan for the Library.
3. Utilize technological means to distribute information whenever possible; to be measured by Google Analytics or similar programs on a case-by-case review cycle.
4. Identify non-users of the Library and their needs.

Performance benchmarks:

- A. Develop strategies to best reach 80% of our constituent sub-groups after reviewing aforementioned quarterly surveys (see Initiative #3, Goal 1.).
- B. Include line-items in the annual budget to design, publish and distribute high-quality public relations materials for every department.
- C. Continuously review for accuracy and coverage our email lists and our social media followers.
- D. Create a process to identify non-users of the Library in 2016 and develop a strategy to target non-users of the Library in 2016 to determine why they do not use the Library.
- E. Advance a strategy in 2017 to invite non-users to the Library.
- F. Increase circulation of all materials and increase attendance for programs, and visits from 2014 levels by 3% by 2018.

Objective 3: Promote an organizational culture of connection

Actions:

1. Enhance staff and volunteer experiences by initiating mandatory communication training.
2. Provide supervisory staff and rising workers opportunities for expanding management skills.
3. Encourage cross-training, commensurate with compensation and Civil Service accommodation.
4. Provide all employees with clear information about pathways for possible promotional opportunities.

Performance benchmarks:

- A. Yearly customer service training will include active listening (see Initiative #1, Goal 1.) until it is used routinely by all staff in their daily interactions with patrons and each other.



- B. Library managers will continuously develop work opportunities for all members of the staff that promote connectivity, collaboration and advancement.

Goal #4 Crandall Public Library is a Gateway for the Next Generation of Library Patrons

Objective 1: Surmount barriers associated with acquiring, maintaining and keeping technology up-to-date.

Actions:

1. Focus on appropriate technologies which mirror the interests of our community.
2. Work with consortia and other partnerships to get the best values on the purchase of equipment, software and electronic materials.

Performance benchmarks:

- A. Technology acquisition decisions will be up-to-date and meaningful 100% of the time as informed by patron and staff desires and in-depth staff research.
- B. Electronic resources and associated equipment will be purchased through consortia pricing, government pricing or equivalent opportunities at least 80% of the time.

Objective 2: Public service staff will uniformly be comfortable with many types of hardware, apps and programs

Actions:

1. Make technology training readily available to all employees.
2. Ensure that Library representatives are able to adequately help patrons and each other with basic technology needs.
3. Encourage staff to experiment with new technologies and provide said resources whenever possible.

Performance benchmarks:

- A. All supervisors will develop blocks of time for training opportunities for their staff.
- B. 100% of professional and paraprofessional staff will be competent in basic tech skills and 90% of all other staff should be familiar with rudimentary techniques.
- C. Access to self-directed study thorough technology tutorials, webinars, and other venues will be available to 100% of Library staff.
- D. The Innovation and Patron Experience Librarian and the IT Department will be proactive in introducing new devices to the staff; 100% of staff will be encouraged to “play” with the new tools.

Goal #5 Crandall Public Library will be an Excellent Steward of Library Resources Especially with Regard to Sustainability and Investment

Objective #1: Develop new and creative methods that can be applied to fundraising and asset allocation given intrinsic constraints on Library District budgeting (tax cap, minimum wage, etc.).

Actions:

1. Cut resources from underutilized programs and services.
2. Create a cohesive marketing strategy and stick with it.
3. Continue to build-up and establish creative fundraising opportunities.
4. The Board of Trustees will form an ad hoc resource development committee.
5. The Development Director, the Director and members of the Board of Trustees should continue to network to form personal relationships with key local figures and other members of the general public.
6. Partner with the Friends of Crandall Public Library to bolster awareness of the annual budget vote in November.

Performance benchmarks:

- A. Department Heads, as an integral part of the Budget process, will be consulted throughout in order to make equitable decisions about allocations.
- B. Expand Development Director responsibilities by 2016 to include Marketing Director activities in order to ensure a more cohesive approach to Library publicity and to work with the resource development committee.
- C. New clerical assistance for the Development Director will be established by 2016 from existing personnel.
- D. Development Department will continue to increase funding opportunities via grant writing, partnerships and events from 2015 through 2018.
- E. Increase opportunities to be the partner of choice with other regional businesses and non-profits by 50%.
- F. The Finance Committee of the Board of Trustees will advance a fiscal strategy that encompasses the breadth of this document by late 2015.

