Port Hope Public Library

Strategic Plan
2012 to 2018

Port Hope Public Library …
your destination for
inspiration, imagination and information

Library Board of Trustees

The term of the current Port Hope Public Library Board is 2011 - 2015. Board membership is two Councillors and five citizens appointed by Municipal Council.

Board members are:

- Greg Burns, Municipal Councillor, Board Chair
- Barbara Coleman, Vice Chair
- Christie Peacock, Treasurer
- Rick Austin, Municipal Councillor
- Ron Getz
- Anne Irwin-Mercer
- Rick Madden

Barbara Stephenson, Chief Librarian and CEO

Port Hope Public Library

905.885.4712   **www.phpl.ca**   **library@porthope.ca**

PORT HOPE
PUBLIC LIBRARY

STRATEGIC PLAN 2012 to 2018

Port Hope Public Library
... your destination for inspiration, imagination, and information

The Board and Staff of Port Hope Public Library are very excited about our Strategic Plan (2012 – 2018), which was created as a result of extensive public consultation.

This Strategic Plan has identified several key issues that challenge the Board and staff to "raise the bar" by taking our programs and services to the next level of excellence. We have accepted that challenge, and will provide annual updates to the community to demonstrate our success in accomplishing these goals.

Our vision is to make **"Port Hope Public Library your destination for inspiration, imagination and information."** We invite you to join us on our six year journey.

MISSION
The Port Hope Public Library delivers quality, community-focused library services with a commitment to equitable and open access to all resources.

VALUES
- Life-long Learning and Reading
- Freedom of Information and Expression
- Equitable and Open Access

- Community Engagement
- Innovation

STRATEGIC PRIORITIES
Our Library is committed to delivering the best library services possible now and in the future. In order to reach our potential, create and deliver innovative products and services responsive to changing demographics and information needs over the next five to seven years...

1. We will seek and secure sources of additional and alternative funding.

2. We will investigate and implement relevant technologies and deliver information in all formats responsive to changing community needs.

3. We will engage our citizens and stakeholders in discussions about library services through effective communications, dynamic marketing, and strategic partnerships.

4. We will initiate a new model of library service delivery to ensure quality and innovative library services for our changing community.

DELIVERING THE PLAN
Years 2012 to 2014 - Creating the Framework: Starting the Transition

These years will focus attention on the creation of a framework and detailed plans that will set a context for decision-making and financing, to inform the work of the Board and the Library. The *Plans* that will be crafted and launched in these years include:

- Alternative and Additional Funding Plan
- Information Technology Plan
- Communications, Marketing, and Partnership Plan
- Library Service Delivery Model

The Board will develop and implement a funding model that seeks additional funding sources for Library development. This funding is intended to supplement other sources of funding.

Information Technology, a catalyst in the delivery of library services, is a critical asset for the Library of the Future. IT is also costly, in terms of hardware, software, licensing and in staff development. An effective IT plan will require Board and staff skills in setting technology priorities and budget planning in these earlier years.

The Communications, Marketing, and Partnership Plan will direct its attention to enhancing relationships between the Library and the Municipality as well as the Board and Library staff. The new Governance strategy, developed in the past year, will align with elements of this *Plan.*

Effective and responsive performance measures will also be adopted in these first years, providing the Library with an opportunity to better inform the community and funders of the full range of products and services requested and delivered successfully by its Library.

Underlying this work is the integration of a strong marketing strategy that looks outward, tracks, documents, and assists in planning and delivering library services based on future needs.

In 2012 and 2013, priority will be given to creating an overall Service Delivery Model to facilitate equitable Library Service throughout the Municipality of Port Hope. This *Plan* will incorporate critical planning, facility assessment and updated demographic data, resulting in a long range plan of service delivery options.

Years 2014 to 2016 - Our Library: Integral Community Partner

These years will build upon the planning foundation put in place in the earlier years. The website will be enhanced, becoming a critical outreach and feedback communication vehicle for the community.

As the Library evaluates all aspects of its operations, the Library will rely more and more on its rich network of current partners and new alliances, in the development and delivery of its message, products, and services.
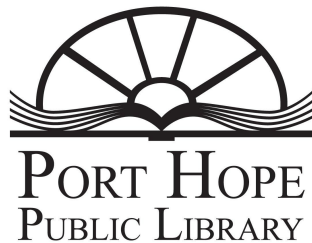
Hand in hand with the implementation of a new Library Services Delivery Model, the Library will undertake two integral studies: review of services to adults, and a review of programs and services to children and youth.

While the Library will continue to serve all community members as it always has, particular attention will be paid to studying and delivering services to older adults.

Years 2016 to 2018 - Evaluating Our Progress: Planning the Next Years

Years 2016 through to 2018 will look to evaluating the effectiveness of this *Strategic Plan*. The benefits of the library services and their usage by the community will be even more apparent, using the performance measurement infrastructure set in place in the earlier years.

Feedback mechanisms and community studies implemented in the first four years of the *Plan* will help shape the directions of the Library for the years

Between 2016 and 2018, two critical studies, the results of which will impact the future planning priorities for the Library, are proposed. One will be a review of the Library's Integrated Library System, the technological infrastructure that maintains and delivers so much of the Library program. The results of this Review will inform the Library decision makers about the configuration and resources required to upgrade or replace this valuable asset.

The second study proposed is a review of collections and their management, tracking their effectiveness, and the changes in collection development and resources required to continue to meet the expectations of the citizens of Port Hope.

STRATEGIC PLAN 2012 to 2018

IMPLEMENTATION PLAN

PORT HOPE
PUBLIC LIBRARY

The *Implementation Plan* is designed to assist the Library Board and the CEO in identifying and tracking projects that address the work of the *Strategic Plan*, leading to its successful completion.

This document includes 4 parts:

- projects for the whole *Strategic Plan* organized by Strategic Priorities
- projects specific to the years 2012 to 2014, by Strategic Priority
- projects specific to the years 2014 to 2016, by Strategic Priority
- projects specific to the years 2016 to 2018, by Strategic Priority

While the projects are grouped by Strategic Priority, please note that many of the projects will also inform and fulfill the work of other projects and their priorities. Also note that, for greater clarity, subheadings have been created for the Information Technology strategy

as well as the Communications, Marketing and Partnerships strategy. These subheadings reflect themes mentioned during discussions with the Board and staff.

This *Plan* includes proposed start dates for each project and the person/people to be involved in the projects. These projects may form part of the Board's *Strategic Agenda* as well as the *Annual Work Plans* for the CEO. Working together, the CEO and the Board will detail the projects and resources required and available to initiate and complete them. Numerous factors including resourcing or the shift in priorities, due to unforeseen events, will impact the start date or completion date of any project or even the possibility of going forward with certain projects. Accordingly the *Plan* is a fluid document that, while guiding the planning and progress of the Library, is intended to respond to community changes of all kinds.

The *Implementation Plan* will need to be reviewed annually by the Board and the CEO and adjusted as required. Rationale for changes in the *Implementation Plan* along with the progress made in various projects and initiatives will be an important piece in the *Annual Report* that goes to both Council and the Community.

Port Hope Public Library: Strategic Implementation Plan 2012 to 2018 by Strategic Priorities

Strategic Priorities	Initiatives	Dates	Who
FUNDING			
	Review both current operating and capital budgets to determine, as much as possible, upcoming budget peaks over the next 5 years; prepare to insert other potential budget peaks due to strategic plan initiatives and determine ways to accommodate costs.	2012	Board, CEO
	Clarify status of provincial grant following recent budget.	2012	CEO
	Clarify impact of loss of CAP funding, for the Library and for the community at large.	2012	CEO
	Confirm availability of any other additional government (provincial and federal) sources of funding for libraries.	2012-13	CEO
	Establish with Municipality stable ongoing operating budget.	2013	Board
	Confirm the availability of additional Municipal funding for the Library, e.g., other funds received by the Municipality that the Library may be eligible for.	2013	Board
	Explore proactive/dynamic fundraising options: ● Delineate fundraising roles and responsibilities. ● Identify in-kind sources of "funding" e.g., partnerships and alliances.	2012-2013 2012-2013 2012-2013	Board Board, CEO, Others Board, CEO
INFORMATION TECHNOLOGY			
Management and Planning	Create a comprehensive IT Plan to guide the Board and Library over the life of this Strategic Plan, to include the following items.	2012-2018	CEO, Municipality, County, External
	● Current Status/lifecycle of hardware, software, peripherals, and related furniture and equipment.	2013	CEO, Staff
	● Determine future IT Needs/dates/costs for additional hardware, software, peripherals, and related furniture and equipment.	2013-2018	CEO, Staff, External
	Initiate and complete current ILS upgrade.	2012-2013	CEO, Staff, External
	Undergo an IT risk management review.	2015	CEO, Municipality, County, External
	Address the future management of the website internally or through an outsourcing process within three years of *Strategic Plan* initialization.	2015-2016	CEO, External
	Review state of ILS and need to upgrade the Integrated Library System (ILS) from Horizon software to Symphony software or to another ILS platform.	2016-2017	CEO, External
	Evaluate overall IT strategy and future needs.	2017	CEO, External
	Tender, acquire, and implement "new" ILS system.	2018 --	Board, CEO, External
Training and Development	Develop Board IT training program in order to inform their planning and budget preparations.	2013-2014	Board, CEO, Staff
	Develop short term and long term ongoing staff training program that includes refresher courses, for training staff and the public alike in new technologies.	2013-ongoing	CEO, Staff

Configuration and Hardware	Review and update configuration of public computing, accommodating laptop and personal IT devices, e.g., electrical outlets, and increased need for public training.	2014-2015	CEO, Staff
Website	Ensure the website reflects the Library's Vision, Mission, and Values. Undertake an annual comprehensive review of the website to ensure that it continues to meet Library needs with respect to content and functionality.	Ongoing	CEO, Staff
	Revise the website to create a clear summary of services; a statement of the Library's governance model and profiles of the Board members, ways to contact the Board and management; incorporate links to a Customer Feedback mechanism and a FAQ section. Add select social networking devices, e.g., Facebook. Devise opportunities for donations.	2012-2013	Board, CEO, Staff, External
	Provide value-added content on the website, including staff recommended external websites, electronic pathfinders, and links that will enhance the user experience, with particular focus on the Municipality of Port Hope resources and issues.	2015-2016	Staff, Municipality, External
Future Services	Review and plan current and new services that expect technological support, e.g., e-readers; bookable laptops; other social networking devices; website improvements; early literacy workstations; genealogy research; self publishing; upgraded office software packages.	2014	CEO, Staff
COMMUNICATIONS, MARKETING, PARTNERSHIPS			
Communications	Prepare and confirm the Library's new Communications and Marketing Plan that will include some of the elements that follow.	2012-2013	Board, CEO
	● Prepare and distribute a "waveable" *Strategic Plan* document; post on website and encourage community feedback.	2012	CEO, External
	● Roll out the final *Strategic Plan* to all staff through staff sessions, organized to share information and to gather concerns.	2012	Board, CEO
	● Adopt a mechanism for tracking the progress of work resulting from the *Strategic Plan*.	2012	Board
	Prepare an annual report for distribution to the community, focusing on the progress of the *Strategic Plan*.	2013 onward	Board, CEO
	Prepare a revised Port Hope Public Library orientation plan and package for new Board members.	2014	Board, CEO
	Prepare revised Port Hope Public Library orientation plan and package for new Councillors.	2014	Board, CEO
	Develop reporting schedule so Library Board can report to Council on the Library's progress in achieving its *Strategic Plan*.	Ongoing	Board
	Ensure that the Library Chief Executive Officer and Library staff actively participate on Municipal Committees in order to gain and share insights and issues into long range planning for Port Hope and for the Library.	Ongoing	Board, Municipality
	Prepare RFP for new *Strategic Plan*.	2018	Board, CEO
Success Factors	Prepare a baseline report that measures the effectiveness of gathering existing data elements and the importance of that information.	2013	CEO, Staff
	Identify and/or implement key measures that reflect the overall activities of the community in its use of Library resources, presented as a per capita value, e.g., per capita cost of library service; per capita circulation; and per capita attendance at programs.	2014-2015	CEO, Staff
	Implement *Counting Opinions* to develop ongoing feedback from the community on the develop and delivery of library services and a mechanisms to respond to the community	2014	Staff, External

Marketing	Plan and implement a "Library Marketing" seminar for staff, Board and volunteers	2012	CEO, Board
	Establish Ad Hoc Committee to create a template for a Library Communications and Marketing Plan.	2012-2013	Board, CEO
	Recruit volunteer "contacts" for older adult service to advise on the development of collections and services and to provide a welcoming presence to the Library.	2014-2015	Staff
Partnerships	Develop criteria for monitoring and evaluating impact of current partnerships; identify future partnerships and opportunities, focusing on the strategic initiatives and groups, e.g., sources of funds, seniors, business, advancing IT strategy, and Library service delivery model.	2013-2014	CEO, Staff
	Develop, in collaboration with the Parks, Recreation and Culture Department and other organizations within the community, more direct involvement of the older adult population in its Library, collections, services, and program development.	2015	Staff
	Investigate an alliance for Youth--Develop, with the assistance of School Student Councils, a Teen Advisory Council and in collaboration with the Parks, Recreation and Culture Department, more direct youth involvement in its Library and program development.	2016	Staff
LIBRARY SERVICES DELIVERY MODEL			
	As a matter of priority, initiate a Library Services Delivery Review to craft a long term plan for Library Services Delivery throughout the community of Port Hope. The Review will include the following elements:	2012	Board, CEO, External
	● detailed demographic review of the community based on Census analyses and Regional Plans; and,	2012	CEO, Municipality, County
	● Facility Assessment.	2013	External
	Based on above results, prepare a report that details service delivery options including community locations, type of services and methods of delivery.	2013-2014	CEO
	Undergo a Service Review for all adult services.	2014	CEO, Staff
	Create a detailed profile of the interests of older adults in the Port Hope community.	2014	CEO, Staff
	Undergo a Service Review for children and young adult services.	2015	CEO, Staff
	Conduct a detailed study of collections and their management.	2016	External
	Evaluate effectiveness of *Strategic Plan* initiatives to delivery of library services.	2017-2018	Board, CEO
	Identify key issues for consideration in new *Strategic Plan*.	2017-2018	Board, CEO

Projects for Years 2012 to 2014: "Creating the Framework - Starting the Transition"			
Strategic Priorities	**Initiatives**	**Dates**	**Who**
FUNDING			

	Review both current operating and capital budgets to determine, as much as possible, upcoming budget peaks over the next 5 years; prepare to insert other potential budget peaks due to strategic plan initiatives and determine ways to accommodate costs.	2012	Board, CEO
	Clarify status of provincial grant following recent budget.	2012	CEO
	Clarify impact of loss of CAP funding, for the Library and for the community at large.	2012	CEO
	Confirm availability of any other additional government (provincial and federal) sources of funding for libraries.	2012-2013	CEO
	Establish with Municipality stable ongoing operating budget.	2013	Board
	Confirm the availability of additional Municipal funding for the Library, e.g., other funds received by the Municipality that the Library may be eligible for.	2012-2013	Board
	Explore proactive/dynamic fundraising options: ● Delineate fundraising roles and responsibilities. ● Identify in-kind sources of "funding", e.g., partnerships and alliances.	 2012-2013 2012-2013	 Board, CEO, Others Board, CEO
INFORMATION TECHNOLOGY			
Management and Planning	Create a comprehensive IT Plan to guide the Board and Library over the life of this Strategic Plan, to include: ● Current Status/lifecycle of hardware, software, peripherals, and related furniture. ● Determine future IT Needs/dates/costs for additional hardware/software/peripherals and furniture.	2012-2018 2013 2013-2018	CEO, Municipality, County, External CEO, Staff CEO, Staff, External
	Initiate and complete current ILS upgrade	2012-2013	CEO, Staff, External
Training and Development	Develop Board IT training program in order to inform their planning and budget preparations.	2013-2014	Board, CEO, Staff
	Develop short term and long term ongoing staff training program that includes refresher courses, and training for staff and the public alike in new technologies.	2013 - ongoing	CEO, Staff
Website	Ensure the website reflects the Library's vision, Mission and Values. Undertake an annual comprehensive review of the website to ensure that it continues to meet Library needs with respect to content and functionality.	Ongoing	CEO, Staff
	Revise the website to create a clear summary of services; a statement of the Library's governance model and profiles of the Board members, ways to contact the Board and Management; incorporate links to a Customer Feedback mechanism and a FAQ section. Add select social networking devices e.g., Facebook. Devise opportunities for donations.	2012-2013	Board, CEO, Staff, External
COMMUNICATIONS, MARKETING, PARTNERSHIPS			
Communications	Prepare and confirm the Library's new Communications and Marketing Plan that will include some of these elements: ● Prepare and distribute a "waveable" *Strategic Plan* document; post on website and encourage community feedback.	2012-2013 2012 2012	Board, CEO CEO, External Board, CEO

	● Roll out the final *Strategic Plan* to all staff through staff sessions, organized to share information and to gather concerns. ● Adopt a mechanism for tracking the progress of the work resulting from the *Strategic Plan*.	2012	Board
	Prepare an annual report for distribution to the community, focusing on progress of the *Strategic Plan*.	2013 onward	Board, CEO
Success Factors	Prepare a baseline report that measures the effectiveness of gathering existing data elements and the importance of that information.	2013	CEO, Staff
Marketing	Plan and implement a "Library Marketing" seminar for staff, Board and volunteers	2012	CEO, Board
	Establish Ad Hoc Committee to create a template for a Library Communications and Marketing Plan.	2012-2013	Board, CEO
Partnerships	Develop criteria for monitoring and evaluating impact of current partnerships; identify those that do not benefit the Library; identify future partnerships and opportunities, focusing on the strategic initiatives and groups, e.g., sources of funds, seniors, business, advancing IT strategy, Library service delivery model**.**	2013-2014	CEO, Staff
LIBRARY SERVICES DELIVERY MODEL			
	As a matter of priority, initiate a Library Services Delivery Review to craft a long term plan for Library Services Delivery throughout the community of Port Hope. The Review will include the following elements: ● Detailed demographic review of the community based on Census analyses and Regional Plans; and, ● Facility Assessment.	2012 2012 2013	Board, CEO, External CEO, Municipality, and County External
	Based on above results, prepare a report that details service delivery options including community locations, type of services and methods of delivery.	2013-2014	CEO

Projects for the Years 2014 to 2016: "The Library - Integral Community Partner"

Strategic Priorities	Initiatives	Dates	Who
INFORMATION TECHNOLOGY			
Management and Planning	Undergo an IT risk management review.	2015	CEO, Municipality, County, External
	Address the future management of the website internally or through an outsourcing process within three years of *Strategic Plan* initialization.	2015-2016	CEO, External
Configuration and Hardware	Review and update configuration of public computing, accommodating laptop and personal IT devices, e.g., electrical outlets and increased need for public training.	2014-2015	CEO, Staff
Website	Provide value-added content on the website, including staff recommended external websites, electronic pathfinders, and links that will enhance the user experience, with particular focus on the Municipality of Port Hope resources and issues.	2015-2016	Staff, Municipality, External
Future Services	Review and plan current and new services that expect technological support, e.g., e-readers; bookable laptops; other social networking devices; website improvements; early literacy workstations; genealogy research; self publishing; upgraded office software packages.	2014	CEO, Staff
COMMUNICATIONS, MARKETING, PARTNERSHIPS			
Communications	Prepare a revised Port Hope Public Library orientation plan and package for new Board members.	2014	Board, CEO
	Prepare a revised Port Hope Public Library orientation plan and package for new Councillors.	2014	Board, CEO
	Ensure that the Library Chief Executive Officer and Library staff actively participate on Municipal Committees in order to gain and share insights and issues into long range planning for the Port Hope and for the Library.	Ongoing	Board, Municipality
Success Factors	Identify and/or implement key measures that reflect the overall activities of the community in its use of Library resources, presented as a per capita value, e.g., per capita cost of library service; per capita circulation; and per capita attendance at programs.	2014-2015	CEO, Staff
	Implement *Counting Opinions* to develop ongoing feedback from the community on the development and delivery of library services and a mechanism to respond to the community.	2014	Staff, External
Marketing	Recruit volunteer "contacts" for older adult service to advise on the development of collections and services and to provide a welcoming presence to the Library.	2014-2015	Staff
Partnerships	Develop, in collaboration with the Parks, Recreation and Culture Department and other organizations within the community, more direct involvement of the older adult population in its Library, collections, services, and program development.	2015	Staff
LIBRARY SERVICES DELIVERY MODEL			
	Undergo a Service Review for all adult services.	2014	CEO, Staff
	Create a detailed profile of the interests of older adults in the Port Hope community.	2014	CEO, Staff
	Undergo a Service Review for children and young adult services.	2015	CEO, Staff

Projects for Years 2016 to 2018: "Evaluating Our Progress; Planning the Next Years"

Strategic Priorities	Initiatives	Dates	Who
INFORMATION TECHNOLOGY			
Management and Planning	Review state of ILS and need to upgrade the Integrated Library System (ILS) from Horizon software to Symphony software or to another ILS platform.	2016-2017	CEO, External
	Evaluate overall IT strategy and future needs.	2017	CEO, External
	Tender, acquire, and implement "new" ILS system.	2018 -	Board, CEO, External
COMMUNICATIONS, MARKETING, PARTNERSHIPS			
Partnerships	Investigate an alliance for Youth--Develop, with the assistance of School Student Councils, a Teen Advisory Council and in collaboration with the Parks, Recreation and Culture Department, more direct youth involvement in its Library and program development.	2016	Staff
	Prepare RFP for new *Strategic Plan*.	2018	Board, CEO
LIBRARY SERVICES DELIVERY MODEL			
	Conduct a detailed study of collections and their management.	2016	External
	Evaluate effectiveness of *Strategic Plan* initiatives to delivery of library services.	2017-2018	Board, CEO
	Identify key issues for consideration in new *Strategic Plan*.	2017-2018	Board, CEO