



2010-2012

Strategic Plan

Researched and prepared by the Worthington Libraries Board of Trustees and staff with input gathered from participation in a collaborative project with the City of Worthington and Worthington Schools.

Approved by the
Worthington Libraries
Board of Trustees on
March 23, 2010



Planning Timeline

January-March 2009

WORTHINGTON AREA 360°: PROJECT DEVELOPMENT

Worked with City of Worthington and Worthington City Schools to develop a joint information gathering process to aid each organization in the development of its own strategic plan. This project was later named: *Worthington Area 360°...Shaping Our Future Together*

March-April 2009

WORTHINGTON AREA 360°: PROJECT DEVELOPMENT

Interviewed and selected consultants to facilitate the joint information process with the City of Worthington and Worthington City Schools.

June 2009

WORTHINGTON AREA 360°: STEERING COMMITTEE

Selected a community steering committee to help guide the process with the city and the schools

July 6, 2009

LIBRARY PROCESS: IDEA TEAM MEETING

Met with staff Idea Team to discuss process for Trend Tracking

July 22, 2009

WORTHINGTON AREA 360°: SURVEY DEVELOPMENT

Met with Bill Grindle, a consultant with Communicā, to discuss questions for focus groups and phone survey planned for fall

August 3, 2009

LIBRARY PROCESS: TREND TRACKING

Staff began Trend Tracking

September 2, 2009

WORTHINGTON AREA 360°: STEERING COMMITTEE

First meeting of the community steering committee

September 16 & 17, 2009

WORTHINGTON AREA 360°: FOCUS GROUPS

Four facilitated focus groups held at Delve Communications

September 22, 2009

LIBRARY PROCESS: BOARD MEETING

Cardholder data analysis presented to the library board by Adam Gay, a representative of Orange Boy

September 30, 2009

WORTHINGTON AREA 360°: TELEPHONE SURVEY CONDUCTED

Telephone survey of Worthington School District residents

October 1, 2009

LIBRARY PROCESS: SERVICES AND PROGRAMS SURVEY

Services and programs survey distributed to all registered borrowers with e-mail access and made available in all three libraries

October 2, 2009	LIBRARY PROCESS: TREND TRACKING Trend Tracking concludes
October 13, 2009	LIBRARY PROCESS: STAFF LEADERSHIP GROUP MEETING Trend Tracking presentation made to members of the library's Leadership Group
October 20, 2009	LIBRARY PROCESS : BOARD MEETING Trend Tracking presentation made to the library board
October 22, 2009	WORTHINGTON AREA 360°: STEERING COMMITTEE Report on focus groups and phone survey to steering committee
October 28, 2009	LIBRARY PROCESS: PUBLIC FORUM AT OLD WORTHINGTON LIBRARY Library hosted public forum to share information about funding as well as future trends that could impact library service
November 4, 2009	LIBRARY PROCESS: STICKY-NOTE SESSION Library staff invited to contribute their ideas and feedback to the planning process
November 5, 2009	LIBRARY PROCESS: PUBLIC FORUM AT NORTHWEST LIBRARY Library hosted public forum to share information about funding as well as future trends that could impact library service
November 17, 2009	LIBRARY PROCESS: BOARD MEETING Presentation by Bill Grindle on focus groups and telephone survey results Presentation by library staff on results of services and programs survey
November 19, 2009	LIBRARY PROCESS: STAFF LEADERSHIP GROUP MEETING Presentation by library staff on results of services and programs survey Presentation on results of sticky-note sessions First draft of 2010 Action Plan reviewed
December 3, 2009	WORTHINGTON AREA 360°: STEERING COMMITTEE Presentation by Meribah Mansfield, Matt Greeson and Melissa Conrath to the steering committee
January 22-23, 2010	WORTHINGTON AREA 360°: VISIONING CONFERENCE Visioning Conference held with invited representatives from the community.
February 2, 2010	WORTHINGTON AREA 360°: BUSINESS FORECAST BREAKFAST <i>Hosted by the Worthington Area Chamber of Commerce</i> Meribah Mansfield, Matt Greeson and Melissa Conrath made a presentation about discoveries made/future direction
February 23, 2010	LIBRARY PROCESS: BOARD MEETING & RETREAT Library board reviews draft of the strategic plan

March 23, 2010

LIBRARY PROCESS: BOARD MEETING

Library board approves 2010-2012 Strategic Plan

Primary Personnel



COMMUNITY STEERING COMMITTEE

Jeff Appel
Bob Chosy
Melissa Conrath
Greg DeLong
Anne Doyle
Lucy Godman
Matt Greeson
Chris Herman
Julie Keegan
Bill Lhota
Meribah Mansfield
Kathryn Paugh
Tracy Ross

LIBRARY BOARD OF TRUSTEES

Lynn Nadler, President
Dan Lacey, Vice President
James Hill, Secretary
Janet Brown
Anne Doyle
David Goldberger
Dawn Valasco

LIBRARY ADMINISTRATIVE TEAM

Meribah Mansfield, Director/Fiscal Officer
Kristin Shelley, Deputy Director
Margaret Doone, Business Manager
Susan Allen, Director of Technology Services
Lisa Fuller, Director of Community Relations & Development
Phyllis Winfield, Human Resources Manager
Pam Beretich, Executive Assistant

LEADERSHIP GROUP

All librarians, circulation managers and the administrative team.

Mission

The mission of Worthington Libraries is to encourage lifelong learning within the community by providing exemplary services and promoting equal access to information.

Vision

Worthington Libraries serve as community centers dedicated to lifelong learning, the exploration of new ideas and cultural exchange. As a vital part of the diverse community we serve, the Library capitalizes on opportunities to build innovative partnerships and aggressively promotes services and programs. The Library keeps promises made to the community by exhibiting careful stewardship of resources and demonstrating fiscal responsibility through the collections and services provided.

Core Values

Communication. We engage in the open exchange of information as a critical process for creating synergy of ideas within our library and with our community.

Quality Service. We anticipate needs and exceed expectations in delivering service.

Future Oriented. We respond appropriately to emerging practices and technologies in library and information science and related fields, and anticipate changes in our community's needs.

Diversity. We strive to be inclusive, and we recognize the dignity of all people from all backgrounds; we value contributions and ideas from all members of our diverse community.

Intellectual Freedom. We are committed to providing open access to library resources which interest, inform and enlighten all people in our community.

Integrity. We act with honesty and fairness as we conduct our business with patrons and each other; we assume personal responsibility for accomplishing the goals of the organization.

Teamwork. We work together in a spirit of cooperation, supporting each others' efforts to achieve organizational excellence and provide quality service.

Organizing Statement

Worthington Libraries will meet the growing demand for library services through careful stewardship of public funds, ongoing exploration of technology, further integration of volunteers and community collaboration.

Positioning Statement

All strategic plans take shape in a certain time and place. They reflect what's happening in the world as much as what's happening in a particular organization or community.

The 2010-2012 Strategic Plan was developed and written during a time of national uncertainty, as our country continues to grapple with a struggling economy, ongoing military operations in Iraq and Afghanistan and determining our response to climate change. Locally, many people are out of work or coping with reduced wages.

In our own organization, we will experience a major change before the end of 2010, as Meribah Mansfield, who has served as library director for more than 18 years, recently announced her retirement (effective July 23). Although she helped to guide the development of this plan, it will be another director, as yet to be named, who will oversee its implementation.

The changes brought about by a shift in leadership can be both exciting and unsettling, and our many conversations with the community indicated they, too, were wrestling with uncertainty about the future. We heard more emphasis than ever before on *maintaining* and *reducing* instead of *growth* and *expansion*.

We listened intently to residents and have incorporated many of their thoughts and suggestions into this plan. This includes maintaining an emphasis on books and other core services.

Effectively positioning the Library for the future, however, means we also have to investigate and explore new ideas, advancing technology and other changes on the horizon that will most certainly impact the Library.

We are operating in a time of limited resources. Although that particular challenge can be partially addressed through careful stewardship, increased use of volunteers, private fundraising and community collaboration, we can't continue to maintain present service levels indefinitely. At some point, despite all of our best efforts, declining revenue will result in service reductions.

We remain hopeful, however, that the current economic climate will recover, and we will strive to remain positively focused on a library future based on thoughtful planning to meet needs of library patrons.

Plan Development

Worthington Libraries, the 2007 recipient of the national Library of the Year award, recently emerged from a period marked by tremendous organizational growth and change, the details of which were outlined in the 2005-2008 Strategic Plan. That plan was developed with input from over 100 community members, and included the goals of securing additional funding for the Library, renovating Northwest Library and Old Worthington Library and bringing library service to residents of the northeast part of our service district—all of which was accomplished.

The 2010-2012 Strategic Plan was also developed with extensive input from the community as well as the library board of trustees and staff. By formally partnering with the Worthington City Schools and City of Worthington to create the Worthington Area 360° project (see below), we were able to ask hundreds of people (through focus groups, surveys and community meetings) to share their opinions, ideas and concerns about the future of the Worthington community.

The impetus to create such a project resulted from the realization that, although we are markedly different in terms of the scope of services we provide, our constituents overlap (the City of Worthington is located in the Worthington School District, which has the same boundaries as the Library) and information gleaned from talking to residents about community life in general could be useful to each organization as we work to develop our individual strategic plans. This process helped us to identify collaborative projects, as well as those we can work on individually, with the overarching goal of maintaining a strong, vital community now and in the future.

In addition to community feedback, the economy was a major influence in the development of this plan and provided the backdrop for every community conversation.

For the Library, economic concerns center on the status of the state's Public Library Fund (PLF). Public libraries in Ohio receive a percentage of the state's general tax revenue through the Public Library Fund. In 2008, this percentage was established at 2.22 percent of total general tax revenue. In the current state biennium budget, this percentage was reduced to 1.97 percent. Funding from the PLF accounts for roughly 21 percent of the library's total revenue (more than 60 percent of annual revenue is generated by two local property tax levies), and the PLF reduction means an annual income loss of a projected \$1.1 million through the end of 2010.

There are clear negative implications for library service as use continues to increase while funding declines. Annual circulation of materials increased by 10 percent in 2009 and has more than doubled in the last 10 years, while the number of staff in our circulation department has remained the same. How this issue of library funding will be addressed by lawmakers at the state level remains to be seen. We will continue to work with our legislators to help them understand how important library service is and will encourage them to maintain funding for all Ohio's public libraries.

Despite funding challenges and the growing demand for service, the Library has continued to evolve because of community investment and careful management. This plan reflects the library's ongoing commitment to stewardship and community involvement, a winning combination that will guide the library's future.

Worthington Area 360°

As stated above, soliciting community input has always been an important part of the library's strategic planning efforts. We've usually approached this community conversation independently, but in 2009, we decided to do something different.

Early last year, we met with leaders from the City of Worthington and Worthington Schools to ask if they would be interested in pursuing a joint information-gathering process that would allow us to collectively talk to residents about their concerns and hopes for Worthington's future and help us to identify collaborative projects. Although at different stages in the strategic planning cycle, we believed all three organizations could benefit from community discussion and we began outlining the process with the help of consultants Bill Grindle of Communicā and Julia Novak of Management Partners. This project also made economic sense, as we were able to pool our resources, sharing the cost of hiring the consultants and other expenses associated with the project.

A steering committee was formed and included representation from our three organizations and the wider community. Committee members served as sounding boards and helped guide the project through its various stages. They also provided a name: *Worthington Area 360: Shaping Our Future Together*. The following is a summation of what we discovered together:

FOCUS GROUPS (September 16 & 17, 2009)

Administered by Communicā

Four Groups: 42 participants

The focus groups first explored the features of an ideal community and hit upon the following ideas/adjectives: good neighborhoods, community oriented, family friendly, safe, stable, diversity of people, accessible, walkable, shopping, restaurants, libraries, variety of churches, parks/natural beauty, good services. They then discussed their overall perceptions related to the Worthington area, local government, Worthington Libraries and the Worthington School District.

Key takeaways for the Library included:

- **Recognized as excellent and a leader**
- Overall very positive: staff, resources, programming
- Children's programs and computers for research seen as important
- Potential concern about the need for a third library (Worthington Park Library)
- Parking issues (Old Worthington Library)
- To offset funding cuts, consider reducing hours or eliminating book bags
- Engage volunteers
- Provide easy access—convenience—like the drive-up window (Northwest Library)

Focus group participants also expressed enthusiasm for future collaboration between the city, schools and library.

TELEPHONE SURVEY (October 2009)

Administered by Communicā

600 responses

Three separate surveys were administered to three groups of 200 school district residents. Survey respondents said their favorite thing about living in Worthington was the neighborhoods/community/friendly people (37%) followed by central location/convenience to lots of

places (28%) and school system/quality of education (15%). When asked to identify the biggest challenge facing the greater Worthington area, respondents overwhelmingly (44%) cited school system funding. Additional responses included the current financial crisis/economic recession (12%) and the high cost of property taxes (11%).

The overall perception from those surveyed is that residents are pleased with the quality of life in Worthington. Ratings also indicate the community is satisfied with the core services provided by all three entities. **Worthington Libraries received an overall satisfaction rate of 97%.**

There was also discussion of maintaining vs. changing. Respondents felt like the three organizations would serve the community best by maintaining core services instead of adding anything new or expanding.

VISIONING CONFERENCE (January 22 & 23, 2010)

60 participants (including the Steering Committee)

Facilitated by Management Partners

Over two days, approximately 60 people came together to discuss the future of the Worthington community. They shared personal stories about what brought them to Worthington and worked together on identifying community strengths, challenges and opportunities. They concluded by developing the following overarching vision statement for the Greater Worthington community.

Greater Worthington is a diverse community that collaborates to provide high quality educational, recreational, employment and artistic opportunities.

With an historic community at its core, Worthington offers 21st century opportunities and global ties. Neighbors work together, support each other, appreciate diverse opinions and connect across all ages, cultures and beliefs.

Our strong public institutions foster and invest in infrastructure, technology, economic development and public services that unite our community.

Additional vision statements were developed for the following focus areas: arts, lifelong learning, technology, city services, community identity, downtown, economic development, parks and recreation and planning for a sustainable community.

WHAT'S NEXT?

Many of the thoughts and ideas gathered during this process are reflected in this strategic plan. Those that don't directly relate to the Library, and those that require greater community collaboration and input, will be further developed by a community work group. This group will help us to identify and implement specific action items related to both the community vision and specific focus areas listed above. Select members of the Visioning Conference, who expressed an interest in continuing their participation in this process, will serve on the work group and their progress will be reported regularly to the community through the media and on the Worthington Area 360° blog created for this project: worthington360.blogspot.com

Primary Focus Areas

STEWARDSHIP

Careful stewardship of public funds is a hallmark of Worthington Libraries. In 2010, Worthington Libraries received a “Making Your Tax Dollars Count” award from the State Auditor and a Certificate of Achievement for Excellence in Financial Reporting from the Government Finance Officers Association (GFOA) for its 2008 Certified Annual Financial Report (CAFR). Less than five percent of government agencies nationally receive the GFOA award and fewer than five percent of all government agencies in Ohio receive the State Auditor's award. The Library also received both of these awards for its first-ever 2006 CAFR and its 2007 CAFR. **We will continue to provide the community with efficient service by carefully analyzing and monitoring library finances, processes, and procedures as well as collaborating with other organizations to share expenses, and advocating for maintenance of library funding.**

SERVICES

A library is defined by the services it provides. Through a survey of nearly 6,000 cardholders we confirmed that Worthington patrons want us to provide books, computer access and programs to increase early childhood literacy. People use and appreciate these services above all others, and our number one service priority is to maintain them. The Library also has an ongoing commitment to provide highly valued services which are used by fewer people, such as interlibrary loan, delivery of books to homebound patrons and foreign language materials. **Therefore, we will maintain a balance of services, including materials, technology and programs, that reflect the stated needs of the community as well as the library's mission to encourage lifelong learning and the open exchange of ideas and information.**

INNOVATION AND LEARNING

A library is, by nature, a learning environment and now more than ever, learning is technology-driven. It's important for the Library to stay at the forefront of technological advances, especially as they relate to how people receive information. We must also be aware of new methods of teaching and research about child development as we help parents and caregivers prepare children for school. **We will explore new ideas and technology to prepare both the Library and the community for the future.**

STAFF DEVELOPMENT

In only the last three years, four former Worthington Libraries staff members became directors of other library systems. We are proud of this legacy. The staff of Worthington Libraries is encouraged to get involved in the Worthington community and in the library profession on local, state and national levels. In 2009, more than 30 staff members were involved with more than 100 community organizations as board members or volunteers. This commitment to community service strengthens the bond the Library has with the community and provides staff with invaluable professional experience. **We will develop the skills of the library staff to make them excellent employees now and sought-after leaders in the future.**

Strategic Initiatives

STEWARDSHIP

We will continue to provide the community with efficient service by carefully analyzing and monitoring library finances, processes, and procedures as well as collaborating with other organizations to share expenses, and advocating for maintenance of library funding.

- Advocate for maintenance of public funding for libraries
- Continue focus on long-range financial planning in order to be prepared to take appropriate action when the 1992 levy expires at the end of 2014
- Work with the Columbus Metropolitan Library to renegotiate the joint agreement for Northwest Library
- Monitor the catalog and circulation system market and develop a list of upgrade priorities for enhancements to Discovery Place, including an acquisitions system
- Renegotiate the Discovery Place contract with Columbus Metropolitan Library
- Evaluate the use of Worthington Park Library to determine the future of the location when the lease on the rental property expires in 2012
- Determine the fundraising goals of the Library and seek alternative funding for programs and service enhancements
- Encourage greater resource sharing among central Ohio library systems and libraries across the state, including program collaboration and collection accessibility
- Maximize efficiencies and standardize procedures in the circulation department to meet the increasing demand for materials, and monitor staffing levels and reassign staff as needed to improve work flow across the system
- Work to reduce the library's environmental impact through waste reduction, resource sharing and recycling
- Investigate conversion of the existing financial software to CMI's Authority Finance or other finance accounting software to allow more functionality and possible integration with a new online catalog and circulation system
- Identify volunteer opportunities and actively recruit qualified community volunteers to contribute their time
- Continue to maintain and protect library investments, such as buildings and equipment
- Support the goals and mission of the Friends Foundation of Worthington Libraries as they seek to grow their membership and provide additional funds to the Library

SERVICES

We will maintain a balance of services, including materials, technology and programs, that reflect the stated needs of the community as well as the library's mission to encourage lifelong learning and the open exchange of ideas and information.

- Pursue collaborative projects identified as part of the Worthington Area 360° project
- Provide core services, such as access to books and computers, and niche services, such as homework help and foreign language materials, that are highly-valued by patrons
- Monitor the use and popularity of e-readers, electronic books and mobile devices and work with partner libraries to determine how and when they should be further integrated into the library's collection
- Promote the library's collection, services and programs to a wide audience using a variety of methods, including social media, to increase awareness and library use
- Maintain and expand brand identity established through the "Find yourself here." campaign
- Use technology to make it easier for patrons of all ages to use the Library
- Evaluate and monitor the use of library services and programs to enhance those that are well-received and potentially eliminate those that are under-utilized

INNOVATION AND LEARNING

We will explore new ideas and technology to prepare both the Library and the community for the future.

- Maintain and develop libraries as community centers for education, quality recreation and lifelong learning activities for people of all ages and backgrounds
- Evaluate new and emerging technologies to determine their impact on the library's collection, services and programs
- Provide opportunities for the public to try new technologies and devices in a supportive environment
- Align outreach initiatives and programs with the needs of the community to promote learning and the exchange of ideas
- Work with schools, daycare centers and community groups to encourage early childhood literacy and foster a lifelong love of reading among children and students
- Provide programs and additional resources to promote community sustainability
- Collaborate with other organizations in the presentation of programs and special events that build and strengthen the Greater Worthington community

STAFF DEVELOPMENT

We will develop the skills of the library staff to make them excellent employees now and sought-after leaders in the future.

- Ensure that staffing levels are adequate to meet service demands at all locations
- Prepare staff for leadership and administrative roles
- Improve internal communication
- Develop staff mentoring programs
- Explore low or no-cost means of providing staff with meaningful training and professional development opportunities
- Develop the technology skills of staff so they can provide better assistance to patrons

Tactical Objectives

The number one challenge facing the Library, which impacts every facet of the organization, will be to select and adapt to new leadership.

That being said, the success of this plan will also be measured in a variety of ways. What follows is a brief list of tactical objectives we plan to accomplish in the next three years which will help us gauge the overall success of the larger plan.

STEWARDSHIP

- Keep spending on library materials at or near 20 percent of operating expenses and spending on library salaries and benefits at or near 60 percent of operating expenses
- Work with the Columbus Metropolitan Library to renegotiate the joint agreement for Northwest Library
- Evaluate operations at the Worthington Park Library and renew the lease agreement if the location is to remain in service
- Seek grant funding for digitization of yearbooks, newspapers and local history videos
- Develop a disaster preparedness and recovery plan
- Upgrade the library's security system
- Replace HVAC controls
- Expand the use of volunteers in the Library
- Standardize procedures across the system

SERVICES

- Implement the acceptance of credit card payment of patron fines and fees
- Implement online registration for programs
- Enable federated searching, which is the simultaneous search of multiple online resources including the library's catalog and research databases
- Design and install uniform signage in all three locations

INNOVATION AND LEARNING

- Determine which school communities need help in preparing children for school and provide outreach to parents
- Provide kindergarten-readiness resource packets for parents
- Develop programs to promote community sustainability and other initiatives identified through the Worthington Area 360° project

STAFF DEVELOPMENT

- Redesign the staff Intranet
- Complete and implement a comprehensive training and development plan
- Provide opportunities and training for staff to learn about new technologies
- Continue to provide opportunities for location and job swaps throughout the system