

Brighton District Library

Strategic Plan 2009-2012

March 22, 2009 Revision

Adopted by Trustees, May 19, 2009

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Executive Summary

The Board of Trustees of the Brighton District Library began a creative, forward thinking and pragmatic planning process during the fall of 2008, seeking to update the foundation statements of the Library and to discern the mission, values, guiding principles and themes which would guide the work of the Board and the direction of the Library for the years 2009-2012.

Description of the Process

The Board was assisted in this process by a Strategic Planning Task Force, composed of a project facilitator, the seven members of the Board, seven members of the Library staff, and eight members of the community, representing many constituencies and the residents of the four governmental units contained within the Library's service district (Brighton Township, the City of Brighton, Genoa Township and Green Oak Township).

Following the initial work of the Task Force, seven research teams will be charged with collecting and presenting current practices, emerging trends and recommendations for action in the critical areas of: (1) marketing and communications; (2) relationships; (3) literacy partnerships; (4) universal design; (5) regionalism; (6) facilities; and (7) resource development .

The Board will receive the research team reports throughout 2009 and early 2010. The Board will review the findings at the regular midyear Strategic Planning Task Force meeting and will draw from the team recommendations when drafting the Library's annual budget, determining capital projects and aligning staffing needs. Those reports will be supplemented and revised, as needed, throughout the three-to-five year planning period.

A project analysis template, intended to prompt structured review and comment opportunities throughout the financial and policy review stages, has been developed for use by the Board. See Appendices.

Role of the Library

The Library serves all of the citizens of the community. It is the prime source for educational, informational, recreational and cultural resources and activities.

It introduces infants and young children to the rich oral tradition of the world's cultures. It supports students of all ages in their quests for information, knowledge and wisdom. It provides the hard facts and emerging theories which guide business, financial and governmental decisions. It teaches critical information-seeking skills. It supplies the

resources that enrich daily lives, assisting every individual to learn, to grow and to dream.

The Library is the cultural center of the community. While books and other printed materials form the foundation of the Library's resources and services, the Library is also the home for art, music, theater, informative lecture, storytelling and other interactive cultural forms. All topics and all opinions are housed in the Library, forming a safe environment for exploration and examination of ideas.

The Library is the technology center of the community. Community residents use Library resources to access, manipulate and re-package both facts and fantasy for personal, school and business applications. Individuals learn how to use hardware and software, how to evaluate information received electronically and how to incorporate technology into daily life. For some, the Library is a vital, lifesaving tool, providing the only connection with family and friends around the world. For others, the library is a re-fueling station, supplying content for their multiple technology devices while offering conversational moments with neighbors and community leaders.

The Library is the center of the community. It shapes the future while it preserves the past.

Overview of the Strategic Plan

This Strategic Plan is composed of the following elements:

- the mission statement;
- the vision statement;
- the values driving the Board's decision making;
- the guiding principles shaping access, technology, facilities, communication, finance and evaluation activities;
- the themes for further action drawn from the Task Force sessions;
- the proposed timetable for implementation of the plan; and
- the call for review and renewal at the end of that timetable.

Acknowledgements and appreciation

The recommendations which inform this plan were drawn from the thoughtful, passionate and pragmatic deliberations of the Strategic Planning Task Force.

Members of the Task Force include Marieanna Bair, Melanie Bell, Kevin Brady, Jane Clarke, Diana Dart, Connie Doa, Chuck Fellows, Lee Gough, Jeannette Hill, Nancy B.

Johnson, Anne King-Hudson, Mindy Kinsey, Mike Lenninger, Scott Nielsen, Mary Rose Orczyk, Jane Petrie, Bonnie Riutta, Ed Rutkowski, Beth Walker, Jeff Walker, Sue Wilson and John Yera.

Their opinions, suggestions, reactions and hours in hard chairs were critical to this project and their help is deeply appreciated. They served as advisors to the Board of Trustees and will be continuing watchdogs as the work of the Library in the community continues. The Library's Teen Advisory Board was a candid and engaged focus group, providing the first seeds for the project. The Friends of the Brighton District Library created a detailed SWOT (strengths, weaknesses, opportunities and threats) review. Members of the Library staff, gathered for a fall all-staff meeting, generated an extensive array of services and resources for consideration.

The Board also acknowledges Eric A. Becher, the planning process facilitator and consultant. His *pro bono* services assisted and guided the project throughout its formative stages, provided the structural framework for the process, and anchored each of the four main meetings during the fall of 2008. He will continue to support the Board's ongoing work.

Finally, any project based on dialogue and lively discussion is only as good as the summary of its meetings. Susan Wilson provided excellent minutes, drawing order from the creative chaos which marked the Task Force meetings.

Mission Statement

A mission is the specific task with which a person or a group is charged, the job description for that organization. From 1998 through 2008, the Library was charged with providing “a broad range of library services and materials meeting the educational, informational, recreational, and cultural needs of all residents of the Brighton District Library.”¹

A mission statement is defined by what the organization does repeatedly. The Library has changed what it “does repeatedly” and its mission statement must be updated to reflect those changes.

Over the last ten years, the Library’s services have been expanded and enriched to meet the changing needs of the community. The collection has grown in numbers, in formats, and in breadth and depth. As the Internet and other electronic resources have become more critical in daily life, the Library has broadened the ways in which those technologies are accessed and used by citizens. The Library participates in more collaborative agreements than ever before. These agreements facilitate both mediated and direct library user access to materials and information in southeast Michigan (TLN, the largest library cooperative in the state of Michigan), in academic and public libraries across the entire state (MeLCat), and in selected libraries worldwide (OCLC). Virtual resources are available through MeL, the state-wide electronic library of databases, and such collaborative collection development agreements as Download Destination, the e-book service.

Now, more than ever, the Library is both a single institution and a network of partners who share resources. Now, more than ever, the Library serves as a bridge, as a portal, as a guide, as a partner to individuals in the pursuits that shape their lives.

The Library connects individuals to the world’s cultural and information resources.²

¹ Approved by the Board of Trustees, 1998.

² Strategic Planning Task Force meeting, December 9, 2008.

Vision Statement

The mission statement defines the daily activity of the organization, the task at hand. The vision statement looks to the future, articulating what the organization wants to become.

The Library's vision statement provides the discipline that drives the operation forward. It describes the path and maps the way to advance. It defines how the Library will transform itself; how it will move from the good library that it is now to the great one which it can become.³

In support of the Library's mission, we will:

- **Be the source for educational, informational, recreational and cultural resources and activities for all members of our community;**
- **Create attractive, functional and sustainable environments which facilitate interaction with Library resources;**
- **Continuously deliver excellent customer service.**⁴

³ Jim Collins, Good to Great, HarperBusiness, 2001.

⁴ Strategic Planning Task Force meeting, December 2008.

Values

The values of the Library are the things which the Library does and believes in, the things which define our culture. Library educator Joseph Janes suggests that values are one of five essential elements that must be present for a library to exist.⁵

The American Library Association Code of Ethics serves as a foundational document for the following definition of values.⁶ Key phrases in Strategic Planning Task Force discussions about values in the Library included: a) sustainability underpins all practices; b) universal access is a right of every citizen; c) age-independent ideals should complement age-dependent programs and services; d) stewardship of the world's intellectual and artistic records in images, texts and sounds preserves them for the next generation; and (e) partnerships with individuals, governments, agencies and organizations improve the daily life of our community.

The Library centers its work around these values:

- **We open our doors, services and resources to all members of our community;**
- **We believe in intellectual freedom;**
- **We protect everyone's right to privacy and confidentiality;**
- **We work hard to deliver courteous, equitable and unbiased service;**
- **We carefully sustain the resources entrusted to us;**
- **We are part of our community.⁷**

⁵ The others are "stuff, support, place ... and interaction."

Joseph Janes, *The Right Question*, American Libraries, September 2008, p. 47.

⁶ American Library Association, Code of Ethics, adopted 1997, amended January 2008.
See Appendix for the full text.

⁷ Strategic Planning Task Force Meeting, December 2008.

Guiding Principles

Guiding principles are the elements which support the organization's major areas of work and service. Principles were developed for (1) access; (2) technology; (3) facilities; (4) communication; (5) finance; and (6) evaluation.

The Library provides:

- **open access to a wide variety of opinions for a diverse audience;**
- **appropriate technology;**
- **an attractive, carefully located environment;**
- **universal design to support universal access;**
- **careful stewardship of resources;**
- **excellent customer service.⁸**

Access

Access means intellectual freedom, the ability to access a wide variety of opinions without fear. This freedom anchors the safe and secure atmosphere for intellectual explorations which individuals hope to find when they enter the Library. The public's trust in the Library must be protected by vigilant preservation of intellectual freedom and its companions, privacy and confidentiality.

Access also means having sufficient resources. The first and most critical resource is people: sufficient and knowledgeable staff. Access also means stocking materials at a variety of reading levels, remembering that the community members have a range of literacy skills. It means having enough to go around, whether that means copies of the newest bestsellers, ergonomically-appropriate chairs at the computer workstations or spaces in the parking lot. Access does not require ownership. It does require partnerships which offer materials, equipment or space to be shared and the continuing willingness to share them.

⁸ Strategic Planning Task Force meeting, December 2008.

Access also means that all individuals are allowed to use the physical space independently. Universal design elements that accommodate people of all abilities, needs and interests should be evident in everything that is created for library users and library staff, from the simplest of signs to the layout of the most complicated technology screens. Each element should complement the building's features, carefully meeting or exceeding the Americans with Disabilities (ADA) guidelines.⁹ Visual and hearing impairments are to be considered as carefully as are mobility challenges.

The building must be open enough hours, at the right times, to allow individuals an opportunity to use the materials and the equipment and to attend meetings and programs in the building. Sidewalks and parking lots must be safe and must provide sufficient spaces to accommodate visitors. Signs must be clear and informative.

Technology

Technology is meant to be a tool to ease the work and to improve the process. Printed books are the products of enduring technologies that lessen the need for memorization while storing the magnificent oral tradition of cultures worldwide. Compact discs allow inexpensive distribution of the beauty of orchestral music and sharing of the most critical of datasets. Self check-out circulation stations allow the library user anonymity and independence.

Technology is a tool to be used, not a tyrant to be feared. But, for many members of the community, computers and MP3 players and ebooks are as foreign as the Yupik and Inuit languages of the Canadian north. Classes and encouragement should be as much a part of the Library's technology offerings as are the tools themselves.

The Library will strive to select the most appropriate technologies. While a reference question may come into the Library via online chat, the best answer may be stored in a current local newspaper. Technology can spread the Library, making resources ubiquitous rather than location-specific, allowing the Library to be "somewhere *and* everywhere."¹⁰

The ability to duplicate information exactly, through digitization, has raised issues about the intersection of universal access and intellectual property rights. Libraries must help their clients understand that just because technology allows exact duplication, that duplication may not be ethical or legal. Classes that teach research methods to students or that teach ebook downloading techniques to commuters must also teach the principle that information and artistic expressions are valuable commodities, to be treated with respect and care.

Technology in the Library is also subject to universal design and ADA guidelines. Libraries provide "essential tools and resources for people who cannot search for

⁹ American with Disabilities Act of 1990 with amendments, generally 42 USCode 12101 following.

¹⁰ Joseph Janes, In the Library, American Libraries, June/July 2008, p. 49.

information themselves,”¹¹ including individuals with learning disabilities, those with visual impairments and English language learners.

Facilities

A library building is “a necessary and convenient place for storing things. It also makes a great meeting place, touchstone for the community, and symbol for the values we share and uphold.”¹² A library is just like the books on its shelves. It is a technology tool to be used to support the programs and services housed there, a means to accomplish partnerships and universal access to information and cultures.

The Library is a community center and it strives to be community centered. While the physical location of any brick-and-mortar facility is very important, the appropriate design of that building for the needs of the community is even more important. A small building may be the right choice for a community that accesses library materials by email and Acrobat reader. A much larger building is the right choice for a library that provides several meeting rooms, hosts children’s art and music events and that requires storage space as part of a sustainable recycling program.

Universal design and ADA compatibility are expected facets of both the virtual and the physical homes of library materials. So are the tenets and practices of sustainability and good stewardship, especially for library locations which strive to protect local wetlands and woodlands through careful maintenance of grounds and preserves.

Communication

Communication about libraries and the services which they provide can be divided into two different categories. Advocacy for libraries as community resources provides voters, elected officials and potential donors with an understanding of why libraries are important and why they should be supported with both dollars and positive public policy. Such advocacy should be continuous and not just a project that appears at election time.

Informational communications, items about a library service or about the dates and times of a new preschool storytime series, should be part of a structured marketing strategy. “Libraries understand that unless the community is aware of an event, attendance will not be high enough to warrant the effort [and the cost] on the library’s part.”¹³

Both types of communication must be properly placed within the community media marketplace, targeting the best audience and using the most effective methods. More types and frequencies of communication are needed when a community’s residents

¹¹ Learning Disabilities Association of Michigan, written communication, June 30, 2008.

¹² Joseph Janes, In the Library, American Libraries, June/July 2009, p. 49.

¹³ Elisabeth Doucett, Creating Your Library Brand, American Library Association, 2008, p. 8.

have access to multiple information resources, such as book stores, cable television, satellite radio and other libraries within easy travel distance.

The Library's market is characterized by multiple audiences, including children, newcomers to the area, and busy commuters. Multiple audiences means that multiple methods of communication must be used and that every message must be properly placed. Universal design principles and ADA guidelines shape all messages.

Finance

The Library's Board of Trustees is charged with carefully maintaining the tax revenues, individual donations and other funds which are used to support the Library's activities. Access to the Library's financial information, for Board members and for the public, should be simple and the transactions should be transparent.

Planning and spending should be appropriate to the need at hand, with careful attention to the future as well as the present. Decisions are guided by a "triple bottom line" (financial, social and environmental) model drawn from the green movement.¹⁴

Resources should be distributed to serve the Library's many constituencies equitably. The Library will continuously seek community allies, looking for partners able to maximize the physical and the virtual space, the resources, and the dollars available for library services and programs in the community.

Evaluation

An organization must measure its progress along the path. Is it realizing the vision that defines its future or is it just standing still? Evaluation should be responsive, rather than simply documentary, serving as the catalyst that keeps the Library striving for the next level.

Evaluation measures will address all services, facilities and resources. Special attention will be given to measures which are addressed in the Library of Michigan Quality Services Audit Checklist (QSAC)¹⁵ Definition of the metrics for evaluation will be standard for all program planning. Multiple measures will be used in evaluation of the Library's work, to encourage feedback from all of the Library's audiences, including methods which meet ADA guidelines and universal design precepts.

Evaluation will be seen as a path to the truth. "When you conduct autopsies without blame, you go a long way toward creating a climate where the truth is heard ...and the brutal facts confronted."¹⁶ Truth is a critical tool in good planning and is the goal of all evaluation measures.

¹⁴ Kim McKay, True Green @ Work, National Geographic Society, 2008.

¹⁵ Library of Michigan, Quality Services Audit Checklist, established 2004. Brighton District Library currently is certified at the Essential level.

¹⁶ Jim Collins, Good to Great, Harper Business, 2001, pp. 74-76 passim.

Seven Themes for Further Action

Theme development

The Strategic Planning Task Force solicited ideas for tactics and initiatives that would further the newly-defined mission. Suggestions were filtered through several priority exercises during the Fall 2008 meetings.

As a result of those priority rankings, the Task Force identified seven distinct planning areas, or emerging themes, for further action. The themes were drawn from the lists of proposed library services and resources generated by the focus group sessions, from SWOT¹⁷ points identified during the role playing activities of the Task Force during its meetings, and from the prioritized tactics lists developed using those reports.

- Marketing and Communications
- Relationships
- Literacy partnerships
- Universal design
- Resource Development
- Regionalism
- Facilities

Project Research and Analysis

Planning and progress must always be partnered with strong project analysis. Any project idea suggested by the tactics or initiatives included within the seven themes will be considered using the formal Project Analysis structure developed as part of the Fall 2008 meetings of the Strategic Planning Task Force. (See Appendices)

Three outcomes are possible:

- The idea warrants additional exploration and a research team is formed;
- The idea does not need additional research and the initiative moves ahead immediately; or
- The idea is not suitable at this time and is placed on hold

¹⁷ SWOT stands for Strengths, Weaknesses, Opportunities and Threats.

Research teams, the small committees composed of Library staff, Board members, and community volunteers, will collect information from other libraries, from other communities and from other agencies to assist with the evaluation of proposed projects. Information gathering will be guided and findings will be reported using the framework of the Project Analysis document. Research teams will send completed reports back to the Strategic Planning Task Force for review and possible action.

In addition to the Project Analysis framework, the decision to continue work on any project is informed by review of four key planning questions:

- Whom does the Library want to serve?
- What programs or services will reinforce the Library's distinctive image?
- How does the Library want to be perceived?
- How will Library decision makers know when any initiative is succeeding?

Recommendations

Theme One: Marketing and Communications

All participants in the Task Force activities recommended that the Library do more to market library resources and services. The advice was strong and constant.

- Use both informative and advocacy types of communications
- Create a concerted marketing strategy.
- Design and use a new library brand.
- Define and target highly visible area media outlets.
- Enhance communication to both potential and current donors.
- Form a research team to evaluate the Library's current marketing and communications and to investigate marketing and communications practices in peer institutions

Theme Two: Relationships

All participants in the Task Force activities recommended that the Library do more to create or revitalize relationships with community organizations and populations. The Library's partnerships with area schools, with local governments, with historical societies, with social service agencies, with service clubs, with business associations, and with the Library's Friends group are important factors in the health of both the Library and the community.

- Define target populations for relationships. Examples include home schooling parents, visually impaired individuals, business owners and young teens.
- Appoint continuing liaisons to community organizations such as the historical societies.
- Improve information sharing among community partners.
- Form a research team to evaluate the Library's current relationships and to investigate relationship practices in peer institutions.

Theme Three: Literacy Partnerships

All participants in the Task Force activities recommended that the Library do more to address literacy needs in the region. The ability to access, to understand, to evaluate and to manipulate information is a survival skill.

- Spread action across five different aspects of literacy: (1) early childhood education; (2) school-aged children; (3) adult print literacy; (4) computer and technology literacy for all ages; and (5) information literacy for all ages.
- Partner with area families, with area schools, with area social service agencies and with area literacy volunteers to improve literacy levels in Livingston County.
- Investigate the steps necessary to reestablish a Livingston Literacy Council
- Form a research team to evaluate the Library's current literacy partnerships and to investigate literacy practices in peer institutions

Theme Four: Universal Design

All participants in the Task Force activities recommended that the Library review building layout, signage, electronic resources, and public programs for universal design elements. Access to facilities and resources is the right of all members of the Library's community and will be facilitated whenever possible.

- Use multiple formats, logically placed in an easily navigated environment, to present information about Library programs and services
- Evaluate the current status of the Library building in view of Americans with Disabilities guidelines.
- Form a research team to evaluate the current status of the Library building and services in view of universal design recommendations and to investigate such practices in peer institutions.

Theme Five: Regionalism

All participants in the Task Force activities recommended that the Library continue exploration of regional library services and resources as expressed in the 2003 needs

assessment report.¹⁸ Livingston County residents are extremely mobile and will move across political and transportation boundaries in search of what they need, including library services and resources.

- Explore additional collaborative collection building opportunities similar to current ebook and information database services.
- Participate in joint continuing education activities for the County's six library boards of trustees
- Continue joint summer reading program activities
- Continue joint appearances at area job fairs, social agency resource days and other similar information events.
- Develop more area-wide programs, such as Livingston Reads, to be presented in a series format by multiple libraries rather than as solo presentations by individual libraries.
- Identify opportunities for collaboration with those libraries physically located outside the county which serve county residents regularly (eg. Salem/South Lyon, Dexter, Northfield Township)
- Form a research team to evaluate current regional activities and to investigate regional practices in peer institutions.

Theme Six: Facilities

All participants in the Task Force activities recommended that the Library review the facilities available to area residents. The advice was strong and constant. Great facilities are seen as a critical tool in the delivery of great services.

- Define the Library facility as a tactic in all plans to accomplish the Library's vision.
- Include facilities used by area partners in all calculations of available space.
- Update the space needs assessment report.¹⁹
- Create dedicated "social space" within the building
- Use sustainable materials and procedures, whenever possible, throughout the entire campus
- Form a research team to evaluate the current facility and to investigate facilities at peer institutions.

¹⁸ George Lawson, Brighton District Library Space Needs Assessment and Service Delivery Options, accepted July 15, 2003, p.1.

¹⁹ George Lawson, Brighton District Library Space Needs Assessment and Service Delivery Options, accepted July 15, 2003.

Theme Seven: Resource Development

All participants in the Task Force activities recommended that the Library do more to expand resource development efforts. All of the SWOT exercises cited budget limitations as both a weakness and a threat to the Library's mission.²⁰

While use of the Library has been growing steadily, revenue sources have not. While efforts to reduce expenses are ongoing, alternative and additional revenue streams must be explored. Particular attention is needed in the private and endowment fund sectors.

- Create a designated staff position to write grants and to build the donor base.
- Explore additional investment options for library funds
- Advocate for better funding for libraries at the local, regional, state and national levels
- A research team should be formed to evaluate current resource development efforts and to investigate resource development practices in peer institutions.

Timeline

The Brighton District Library's Board of Trustees began the current cycle of strategic planning work under Library Director Charlene Huget in the late 1990s and early 2000s. The rapid growth of Livingston County, the ascending importance of the Internet and other electronic resources, and the changes following the service contract drawn "for the purpose of providing reciprocal library services to the residents of the Township of Green Oak" required careful consideration of the Library's mission.²¹ The Library Board adopted a new mission statement in 1998.

Both the space needs assessment report²² and architectural drawings for an expanded building were accepted by the Board early in the decade. The Library received QSAC Essential certification in May 2005.

The retirement of Director Huget in early 2007 sidelined the Library's preliminary return to formal strategic planning. The current Strategic Planning Task Force was formed in midyear 2008, to resume a decade-long discipline of discussion and deliberation.

This planning cycle is intended to cover the years 2009 through 2012. Economic, political and governmental changes may force modification of the planning cycle, especially if the current economic climate continues.

²⁰SWOT stands for Strengths, Weaknesses, Opportunities and Threats.

²¹ Library Services Contract, July 23, 1997 between the Brighton District Library, the Northfield Township Area Library and the Salem-South Lyon District Library.

²² George Lawson, Brighton District Library Space Needs Assessment and Service Delivery Options, as accepted July 15, 2003.

The following steps are anticipated:

January 2009

- The Board receives the draft strategic planning document

February through April 2009

- Three research teams are charged:
Marketing and Communication;
Relationships;
Literacy partnerships

May through June 2009

- Two research teams are charged:
Universal design
Resource development

July 2009

- The Strategic Planning Task Force yearly meeting
Key topics to be addressed include a revised SWOT analysis, budget implications, and metrics. Reports are received from research teams

September 2009

- One research team is charged:
Regionalism

October 2009

- Annual budget meeting

November 2009

Library annual appeal campaign

December 2009

- The final research team is charged:
Facilities

July 2010

- The Strategic Planning Task Force yearly meeting
Reports are received from research teams

July 2011

- The Strategic Planning Task Force yearly meeting
- The members of the next Task Force are identified

Fall 2011

- A new strategic planning cycle is started.

Review and Renewal

Strategic planning is a little bit like housework. Just when you think that you have everything completed, the last bed has been made and the dishwasher is empty, it is time to start over again.

Much of the work of this "Class of 2009-2012" will only be evident after this strategic plan has been replaced by the next one. Or even the one after that.

There will be few tangible measures of success for the work of the current Strategic Planning Task Force. Receipt of Enhanced QSAC certification, the next level of quality, will be one of them.²³ Implementation of a new brand, the critical part of an integrated marketing campaign, will be another one.

The long-term success of this plan will be measured by the support of the community for its Library.

The next Brighton District Library strategic planning cycle will begin in the fall of 2011.

²³ QSAC stands for the Library of Michigan's Quality Services Assessment Checklist. The Library currently holds Essential certification; Excellent is the third and final certification level.

Appendices

Map – Library Districts in Livingston County

Map - Brighton District Library boundaries

Summary - Brighton District Library Services and Usage Summary

Code of Ethics of the American Library Association

Project Analysis framework