

Traverse Area District Library

Strategic Plan 2007 - Progress Report and Conclusion

A. Goal: TADL will increase services to the underserved

1. Strategy: Identify who is underserved
 - a. [Service Delivery Planning Guide](#) conducted for TADL by George Lawson Library Planning and Fanning|Howey in 2010 showed aggregates of users who travel farthest to Woodmere and/or who bypass branches to drive to the facility on Woodward Avenue.
 - b. The Board held a Study Session in April 2009 on this topic.
 - c. In 2007 the Library Director contacted the director of the Senior Center to explore a cooperative arrangement for programming for seniors. We have no evidence of an outcome from this meeting.
2. Strategy: Develop & Implement Delivery systems to identified population
 - a. New Kingsley Branch in 2009; Kingsley Branch hours expanded in 2010. This is one of the busiest TADL facilities.
 - b. East Bay Branch improvements (sign, lighting, carpet) in 2010 generated additional users in that facility.
 - c. Budget development in 2010 focused on allocating additional resources for branches.
 - d. Expanded online services are available from homes with internet @ high speed, including purchased information databases, downloadable audiobooks as well as e-Books in 2010 and 2011.

B. Goal: TADL will acquire, develop and continually update the most appropriate technology that meets the needs of the district allowing us to extend services and optimize staff resources.

1. Strategy: Make an initial immediate assessment of the current needs and act on it

No report on this particular activity but results are in evidence below.
2. Strategy: Complete periodic assessments of both internal and public technology needs

No report on this particular activity but results are in evidence below.

3. Strategy: Review available Integrated Library Systems to match our growth needs and make improvements

- a. Evergreen, an open source integrated library system, was selected and implemented in 2008. Implementation is ongoing.
- b. Other systems, including Innovative Interfaces, were evaluated

4. Strategy: Overhaul the TADL website

- a. Drupal open source website development product was implemented in 2009
- b. Ongoing staff training for team approach to website development was implemented in 2010.

C. Goal: Maximize the creativity and effectiveness of TADL's people.

1. Strategy: Examine the current allocation of human resources, adjusting as necessary

- a. The Hartzell-Mika team was engaged and assessed staffing as well as organizational structure at Woodmere, East Bay and Kingsley. The study was completed in 2007 and reviewed with Administrative staff. Some recommendations were implemented while others were rejected at the time as not feasible or not an improvement over the status quo.
- b. In 2010, a personnel budget allocation was identified for TADL each department and the Library seized the opportunity presented by nine retirements to add professional staff and re-allocate human resources. Continuing into 2011, work is under way to reduce redundant staffing at Woodmere's five public service desks. Both of these activities were recommendations cited in the Hartzell-Mika report.

2. Strategy: Attract, train and maintain effective Board members
 - a. Notice is published by appointing body, which conducts interviews of prospective trustees;
 - b. The Director meets with new trustees and provides training materials.

D. Goal: TADL will create a consistent district-wide identity

1. Strategy: Educate the public on services that we provide
 - a. Masthead for the TADL/Friends newsletter was upgraded and incorporates identity and news from all community libraries. (2010)
 - b. Website masthead is being changed to reduce the Woodmere-centric impression in 2011; it indicates all locations and includes news and events from each community library.
 - c. (2010-2011) Director visits Community groups to speak about the library formally and informally. The Director has visited with community officials individually.
2. Strategy: Make people aware of the TADL connection with all points of service
 - a. Identical TADL Bags are distributed from all six locations (pre-2009)
 - b. Identical Borrower Cards are distributed from all six locations (pre-2009)
 - c. A handout with list of TADL facilities is distributed from all six locations (pre-2009)

E. Goal: TADL will identify, develop and allocate resources to meet the above goals.

1. Strategy: Assess and define our available current resources
 - a. In 2010, the budget was defined and fully allocated by cost center
 - b. In 2011 March, fund balances were defined for specific uses by policy
 - c. In 2010 and 2011, staff vacancies have been captured and reallocated

2. Strategy: Actively look for collaborations and partnerships
 - a. The Board held a Study Session in April 2008 to discuss expansion of library services in the District.
 - b. The Long Lake plan to include a branch library in the new elementary school was in part a response to this strategy.

3. Strategy: Identify and pursue alternative revenue sources
 - a. No information was found to show progress on this item.

4. Strategy: Apply a zero-based approach to the allocation of resources
 - a. In 2010-2011 this was partially used as a method for the new Director assessment of resources and services and partially the approach for developing a cost center based budget, primarily as an education for the new Director; I do not recommend this annually.
 - b. The Hartzell-Mika team actually recommended against this approach in their 2007 report as so much work it would be impractical. When the new Director came in it was a good exercise even if not strictly a Zero Based Budget exercise.

- c. The Finance committee looked at changing the structure of the budget to facilitate a more zero-based budgeting approach. Some changes were made, but no major structural changes.

Compiled in 2011 by Dawn Buchcanan and Metta Lansdale. Although there were no formal action plans or progress reports tied back to this Plan, there was progress that can in many ways be tied back to most elements of the Plan. This report collects this from personal observation and a review of board and administrative action since 2007.