

Introduction

Recent History of Planning at Erie County Public Library

Planning, and follow through with planning, is the key to success in any organization. The Erie County Public Library (ECPL) has been actively involved in three major planning activities in the last seven years.

1. In 1998, Graney, Grossman, Ray and Associates, of New Wilmington, Pennsylvania, prepared a report entitled ***Erie County Public Library Services: Analysis and Plan***. The report was a follow up to A Study Prepared To Assist In The Implementation Of The Erie County Community Facilities Plan. The consultants worked with the staff of the Erie County Executive's Office, the Erie County Public Library, and the Erie County Planning Department.

The ***Analysis and Plan*** was a result of the Erie County Community Facilities Plan, the purpose of which was to ensure that all community facilities and public services in Erie County and its communities are adequate for the levels of growth and development expected through 2010. The ***Analysis and Plan*** also "examines the ability of these facilities to adequately serve current county residents in a manner which makes Erie County a better place to live, work, learn, worship, socialize, and recreate."

The report describes and outlines information in three categories.

- I. Part one is an inventory of public libraries in Erie County and examination of the anticipated public library market, actual use statistics, management, and potential strategies to ensure the infrastructure is ready for the future.
- II. Part two of the report is an analysis of patron and staff surveys.
- III. Part three describes planning and marketing recommendations for public library service.

The summary "positive" conclusion of the report was that the Erie County Public Library is a "success story."

The major "critical" conclusion and recommendation of the study was that the Erie County Public Library must develop and nurture "new partnerships with all sectors of the community."

In the section of the report entitled “*Decisions for the Erie County Government*,” several specific recommendations were made in three broad categories:

1. The County Government is urged to create a “locational strategy” of branches to ensure the delivery of public library services in the Erie County Public Library service area.
 2. The County Government is urged to develop a marketing plan to increase public library use, support, and voluntary financial contributions.
 3. The County Government is urged to facilitate the evaluation of the Library collection and a plan to address its weaknesses.
2. In November, 2004, Library Consultants C. S. Alloway and R. Bowra submitted a ***Report to the Erie County Public Library Foundation: Enhancing and Expanding the Delivery of Library Service to Erie County***.

The consultants were hired, initially, to complete a study to provide direction to the Foundation on how to fulfill its mission to assist in the development of branch library services within the Erie County Public Library. The charge to the consultants was to determine the number, size, services, and locations of branch libraries. However, soon after beginning the study, it became apparent to the consultants that the initial study had to be expanded to include a broader focus and include additional important issues.

The essential recommendations of the Alloway and Bowra study report were:

- I. **Branch size, number, and location.** Develop four strong branch libraries for the system (Iroquois, Edinboro, Millcreek area, and the Glenwood Park / Mercyhurst corridor).
- II. **Marketing.** Develop a formal marketing plan to increase awareness about library services in Erie County.
- III. **Communication.** Develop open, and regular, communication among library stakeholders. Begin with a “Stakeholder Summit” to share and exchange information and observations and plan future meetings.
- IV. **Erie County Public Library Foundation.** The Foundation needs to serve as a catalyst to foster branch library development in the County. The Foundation also needs to increase its endowment through planned giving and other development and fundraising activities and approaches.

- V. **Strategic Planning.** The Erie County Public Library must develop a strategic plan for the delivery of library services to the residents of Erie County. The strategic plan should be comprehensive and include the essential activities of marketing, community relationships, funding, programs and services, and management.

3. In April 2005, the ECPL and its stakeholder organizations began a “fast-track” strategic planning process. They hired D. M. Travis & Associates, a consulting firm, to facilitate the process. Dr. Dennis M. Travis, Ph.D., President of D. M. Travis and Associates, was identified to facilitate the process and help prepare the strategic plan document. This report is a result of that strategic planning.

History and Focus of Strategic Planning

Military beginning and evolution into management practice

The history of strategic planning has its roots in the military. According to *Merriam-Webster Online*, strategy is “the science and art of military command exercised to meet the enemy in combat under advantageous conditions.” Currently, the use of strategic planning as is applied in management has been transformed to mean the art of devising or employing plans or stratagems, a maneuver to gain an end, toward achieving a goal. ***One fundamental element remains the same in both military and management strategic planning: the aim of strategic planning is to achieve a competitive advantage.***

Strategic planning begins by taking a certain period of time to analyze and study the situation and to decide on a course of action. The study results in a formal document, i. e., a strategic plan. Once the planning is done, the actual work of implementation, which is a separate and discrete process, begins. Strategic planning is oriented towards and focuses on the anticipated future. The planning looks at how the world could be different five to ten years from now. It is aimed at creating the organization's future based on what this future is likely to look like.

Strategic planning is based on a thorough analysis of foreseen or predicted trends and scenarios of the possible alternative futures, as well as the analysis of internal and external data. Strategic planning is flexible and oriented towards the big picture. It aligns an organization with its environment, establishing a context for accomplishing goals, and providing a framework and direction to achieve the organization's desired future.

Strategic planning creates a framework for achieving competitive advantage by thoroughly analyzing the organization, its internal and external environment, and its potential. This enables an organization to respond to emerging trends, events, challenges, and opportunities within the framework of its vision and mission, developed through the strategic planning process.

Non-profit and profit organizations

Strategic planning is focused on adaptability to change, flexibility, and importance of strategic thinking and organizational learning. "Strategic agility" is as important as the strategy itself, because the organization's ability to succeed has as much to do with its ability to transform itself, continuously, as it has to do with the right strategy. Being strategically agile enables an organization to transform its strategy depending on the changes in its environment.

During the past decade, organizations have had to confront many changes in their external and internal environment and respond to emerging challenges, such as decreasing financial support or revenue, rapid technological advances, changing demographics, and outdated infrastructure and services or products.

Value of a Strategic Plan over a Master or Long-Range Plan

Differences between traditional planning and strategic planning

The major difference between traditional long-range, or master, planning and strategic planning is that traditional planning focuses on looking at problems based on current understanding and an inside-out thinking mindset. Top-down thinkers often recommend traditional planning. Strategic planning requires an understanding of the nature of the issue, and then finding an appropriate response, or an outside-in mind set. Strategic planning involves wide consultation across an organization.

Long-range planning involves a projection from the present or an extrapolation from the past. Strategic planning builds on predicted future trends, data, and competitive assumptions. Long-range planning tends to be numbers driven. Strategic planning tends to be idea driven, more qualitative. Strategic planning seeks to provide a clear organizational vision for the future. Long-range planning tends to be more *status quo* and political consensus driven.

Purpose of the Study and Strategic Plan

It was determined that the Erie County Public Library (ECPL) needs a comprehensive strategic plan. Comprehensive means that it is both a management and marketing plan. A strategic plan is needed because we live in a changing, diverse, competitive, and complex society and County. A strategic plan is needed because it is an effective tool to ensure good stewardship of the ECPL financial, personnel, and infrastructure resources. A strategic plan is needed as an educational process and tool for ECPL stakeholders and County citizens.

A strategic plan describes "what ought to be." It is an outcome from a thorough and systematic study and introspection. A strategic plan is a product based on the knowledge of internal (Library) strengths and weaknesses and external (County) opportunities and threats.

A strategic plan describes a destination and how to arrive there. A strategic plan is based on an institution's foundational Mission Statement. A Mission Statement is a collective statement developed by an organization's internal stakeholders describing their highest sense of purpose in serving citizen needs.

The Erie County Public Library Strategic Plan, *A Guide for the Future: 2005-2015*, is a long-range plan for library services in Erie County. The Erie County Public Library services promote education, cultural enrichment, and recreation. The Library Director and staff will use the Strategic Plan to guide decision-making for future Library services. The County Council, Friends of the Library, Library Foundation, and Library Advisory Board will use the Strategic Plan to determine their level, and type, of support for future Library services.

The development of the Erie County Public Library Strategic Plan served as an educational process for library stakeholders through their representatives on the Strategic Planning Committee. Development of the Strategic Plan was the first time in recent years that the diverse stakeholders met and systematically studied the mission and goals of the ECPL together.

The Strategic Plan is a management and leadership tool. It is the guide for daily and annual operational plans and decision-making. Operational plans identify detailed tasks, timelines, staff responsibilities, and outcomes. The Strategic Plan is a guide for allocating financial and personal resources and setting priorities on an annual basis.

The Strategic Plan deals with all aspects of the Library that require careful attention to stay on task to implement the Mission of the Erie County Public Library in a changing, diverse, and competitive society and County. The Strategic Plan focuses on priority areas where change is required to deal with external opportunities and threats and internal weaknesses and strengths.

The Strategic Plan does not deal with all facets of the ECPL services. The Director and staff will continue to deal with any areas of Library operations that are not separated out for special attention. However, those areas may emerge as major issues for priority attention in future strategic planning updates.

Overview of a Strategic Plan/A Strategic Plan includes:

I. Mission Statement

The Library Mission statement briefly and clearly articulates the purpose - the reason - for the existence of the ECPL. The Mission Statement, along with the Vision for the Future Statement, defines and guides the daily operational and strategic work of the ECPL.

II. Guiding Core Values

The Guiding Core Values are linked to the organization's character or integrity. Core values are a set of guiding principles that impact how everyone in the organization thinks and acts. The Guiding Core Values are the soul of the organization and the cement that holds it together.

III. Vision for the Future

The ECPL Vision for the Future Statement clearly describes what the Library will look like in the future when it is operating at its best. Together with the Mission Statement and the Guiding Core Values, the Vision for the Future Statement provides the pathway and scenario to how the Library will evolve and achieve its Vision for the Future.

IV. Strategic Priority Vision Statements

The Strategic Priority Vision Statements are a set of priorities that the ECPL will seek to achieve to implement its Mission and to create its Vision for the Future.

A. Goals (for each Strategic Priority Vision Statement)

Goals need to be developed for each Strategic Priority Vision Statement. A goal is a general statement that points direction to the future. Goals are general enough that they can't be easily measured. Goals are directions that can be translated into tangible focused action plans.

B. Action Plan (for each Goal of each Strategic Priority Vision Statement)

An action plan (objective) is an activity, a way to achieve a goal. Action plans can be easily measured. An action plan should be assigned to someone to implement with an assigned deadline date for completion. Resources may need to be made available to the responsible individual (s) to achieve an action plan.

When does a Plan become “Strategic”?

A plan becomes “strategic” when the various units within the Library, and the units in support of the Library, agree upon, and seek to implement, the action plans (objectives) designed to achieve the goals.

Each action plan should include an area unit of responsibility (ies) and person (s) in that area who are assigned the responsibility for achieving a goal through the related action plans.

Approval, funding, and accountability of action plans ensure that the ECPL is in the process of reaching, and achieving, the described destination in each of the Strategic Priority Vision Statements.

Background and Overview of the Strategic Planning Process

A group of Erie County Public Library stakeholders held a “Stakeholders Summit” in Spring of 2005. They discussed, and confirmed, the need to develop a comprehensive Erie County Public Library Strategic Plan.

Dr. Dennis M. Travis, Ph.D., President of D. M. Travis & Associates of Edinboro, PA, was hired as a consultant to facilitate the development of a comprehensive strategic plan. Dr. Travis was selected after an interview with the Stakeholders Summit group, and a separate interview meeting with County Clerk Doug Smith and Jim Spiegel, President of the Library Foundation. Fifty percent of the consulting fee was paid for by the ECPL Library Foundation and fifty percent was paid for by Erie County Council

Normally, a strategic planning process takes approximately twelve months for most organizations developing their first Strategic Plan. However, the ECPL stakeholders were anxious to complete the plan in a four and one-half month “fast track” time period. The goal was to develop an excellent, comprehensive, Strategic Plan that could be used to recommend and document need to the Erie County Council and County Executive for the next annual budget.

To achieve the development of the Strategic Plan in such a short period of time, the Strategic Planning Committee met with Dr. Travis every other week, beginning April 19 through August 16, 2005. Meetings lasted for two to three and one-half hours.

Dr. Travis prepared handouts in advance to distribute at each meeting. The handouts were discussed and action taken on them at each meeting. Dr. Travis drew upon his extensive experience in strategic planning in public and private organizations and in working with university libraries. He also did extensive Internet research and brought related material to the meetings for discussion and reaction.

In the end, virtually every word in the final Mission Statement, Guiding Core Values, Vision for the Future, Strategic Priority Direction, and Goals and Actions was reviewed

and, ultimately, endorsed by the Strategic Planning Committee. The instructional narrative for developing a strategic plan, and related background information, was also supplied by Dr. Travis and subject to review and revision by the Strategic Planning Committee over time to ensure originality and fit in the final document.

It was agreed that Dr. Travis would provide one hardcopy of the Strategic Plan and one disc for use by the Strategic Planning Committee. Dr. Travis recommended that the Strategic Planning Committee keep his copy by and large intact for subsequent use as they meet over time. The goal is for the Committee to have a historical record of its work as it seeks to implement and revise the Strategic Plan over time. The disc is to be used to amend, correct, revise, the Strategic Plan so different copies can be made for the various audiences that need access to the planning process and the ECPL Strategic Plan. The thinking is that some audiences will not need to have all of the instructional related narrative that was provided to facilitate some of the exercises the Committee went through to arrive at its decisions. Also, access to the disc allows the Strategic Planning Committee to ensure that all narrative is an original work and in the way it wants to express it.

The Erie County Public Library Strategic Planning Committee

Erie County Council

Joe Giles, Chairman
*Dave Mitchell, Personnel Committee
Doug Smith, County Clerk

County Administration

Ann Bloxdorf, Director of Administration
*Sue Ellen Pasquale, Manager of Accounting

Library

Margaret Stewart, Director
*Mary Rennie, Main Library Coordinator

Friends of the Library

Robert Gallivan, President
*Marion Gallivan, Member

Library Foundation

Jim Spiegel, Chair
*Bob Angelucci, Member

Library Advisory Board

Helene Grande, President
*Barbara Wingerter, Member

Consultant & Facilitator

Dr. Dennis M. Travis, Ph.D., D. M. Travis & Associates

* Indicates Alternates

Summary of Existing Conditions and Environmental Scan

This section summarizes the outcomes of several workshop meetings with the Strategic Planning Committee. The purpose of these workshop meetings, and related discussions, was to identify the existing conditions in, and an environmental scan of, Erie County. The goal was to identify factors influencing the future Erie County Public Library services in Erie County. Additional and detailed information on the following factors can be found in other reports. For the purposes of our strategic planning, it was sufficient to ensure that the factors were identified and discussed by the members of the Strategic Planning Committee before crafting the actual individual sections of the ECPL Strategic Plan. Brief observations and citations are made below to highlight specific important issues in each identified factor that impacts on future library service. Much of the data noted below is extracted from the reports cited in Appendix A and several Internet web sites.

Population and projections

The 2000 federal census for Erie County showed a population of 280,843 people. This represented a growth of 5,271 (1.9 %) as compared to the 1990 census. Municipal population growth areas include: Fairview Township; Harborcreek Township; Millcreek Township; and Summit Township. Also in that ten-year span, Edinboro Borough lost 10.2% and the City of Corry lost 5.3%.

Population characteristics: Age; Education; Income

All of Erie County's community populations are aging, as is all of Pennsylvania. The median age in the County rose to 36.3 in the year 2000 from 32.9 in 1990. Adults (ages 35-64) make up 37.3% (105,000) of all Erie County Residents in the 2000 census. In the 1990 census, adults (ages 35-64) made up 34.7% (90,000) of all Erie County residents. Young adults (ages 20-34) make up 19.8 % (56,000) of all Erie County residents in the 2000 census.

Education is considered the avenue to prosperity. Approximately 85 % of Erie County residents 25 years and older have a high school diploma or its equivalent. Even though the County has several colleges and universities, it lags behind the state and nation in the number of persons with post-secondary education. In 2002, 37,590 residents in Erie County had at least a bachelor's degree, or 20.9 % of those persons over 25 years old. This represents 1.5 % less of the population with a college degree than the state as a whole, and 3.5 % less than the national proportion.

The median income in Erie County is more weighted toward the incomes that are less. There is a high unemployment rate that persists in Erie County.

Economic Profile: Employment Characteristics; Business and Industry Characteristics

In 1980, 36.1% of Erie County residents were employed in manufacturing. In 2000, it was much less, with 23.8% of the labor force in manufacturing. Nearly 8.5% of the local labor

force is now in the arts, entertainment, recreation, accommodation, and food services. The higher-paying new economy industries of professional services and information were 36% of the local workforce in 2000.

Cultural Characteristics: Fine and Performing Arts and Museums

Erie and the immediate area offer a wide array of cultural activities for its citizens, including: Directors Circle Theater; Erie Civic Music Association; Erie Philharmonic; Erie Playhouse; Lake Erie Ballet; Mary D'Angelo Performing Arts Center; Riverside Inn Dinner Theater; Roadhouse Theater for Contemporary Art; Stage Right Community Theater; Station Dinner Theatre; Corry Area Historical Society; Erie Art Museum; Erie County Historical Society; Commonwealth of Pennsylvania Erie Maritime Museum and Brig Niagara; Experience Children's Museum; Firefighters Historical Museum; Goodell Gardens & Homestead; Hazel Kibler Memorial Museum; The Marx Toy Museum; and the Union City Museum & Historical Society.

Recreation and Sports

AA baseball, Ontario Hockey League hockey, college and high school sports and more make up a tremendous sports scene in Erie. Erie is fewer than 120 miles from Cleveland, Buffalo, and Pittsburgh if you have a taste for MLB, NHL, NFL, or NBA. Local recreation and sports venues include: Erie Otters; Erie Civic Center (home of the Otters); Erie Rugby Football Club; Erie SeaWolves (at Jerry Uht Park); Family First Sports Park; the Lake Erie Speedway; and the Tullio Arena.

Post-Secondary Education

From colleges and universities to adult education, Erie County educators are committed to first-rate and innovative educational opportunities. Erie has a tradition of offering unique and nationally recognized programs, including: CAMtech (Center for the Advanced Manufacturing & Technology); Erie Business Center; Edinboro University of Pennsylvania; Erie County Technical School; Erie Institute of Technology; Erie Team PA CareerLink; Gannon University; Great Leaks Institute of Technology; Lake Erie College of Osteopathic Medicine; Mercyhurst College; Penn State Erie, The Behrend College; Toni & Guy Hairdressing; and Tri State Business Institute.

Erie County School Districts

Erie County School districts include City of Erie School District; Corry Area School District; Fairview School District; Ft. LeBoeuf School District; General McLane School District; Harborcreek School District; Iroquois Area School District; Millcreek School District; North East School District; Northwestern School District; Union City Area School District; Wattsburg Area School District.

County Government and Municipalities

County Government and municipalities include Albion Borough; Amity Township; Concord Township; Conneaut Township; City of Corry; Cranesville Borough; Edinboro

Borough; Elgin Borough; Elk Creek Township; City of Erie; Fairview Township; Franklin Township; Girard Borough; Girard Township; Greene Township; Greenfield Township; Harborcreek Township; Lake City Borough; Lawrence Park Township; LeBoeuf Township; McKean Township; McKean Borough; Millcreek Township; Mill Village Borough; North East Borough; North East Township; Platea Borough; Springfield Township; Summit Township; Union City Borough; Union Township; Venango Township; Washington Township; Waterford Borough; Waterford Township; Wattsburg Borough; Wayne Township; Wesleyville Borough.

Erie County Public Libraries

The Erie County Public Library includes the Blasco Memorial Library; Millcreek Mall Branch Library; Iroquois Avenue Branch Library; Presque isle Branch Library; and Edinboro Branch Library.

Independent Libraries

Erie County Independent Libraries include Albion Public Library; Corry Public Library; McCord Memorial Library; Rice Avenue Community Library; Union City Public Library; Waterford Public Library; and Erie County Law Library.

Emerging Trends at Erie County Public Library

1. Technology

- Fiber optics
- Digital resources
- Customized electronic patron services
- Miniaturization
- Wireless network

2. Patrons

- Immigrant population continues to increase
- Increase in family users (particularly parents of pre-school and school-age children)

3. Services

- Virtual reference
- Electronic gateway to technological services (e-mail, word processing, etc.)
- Outreach services (bookmobile, on-site programming in community)
- Local history, genealogy, and children's materials

4. Programs

- Ongoing demand for programming for children and seniors

5. Infrastructure

- Rapidly aging and unreliable bookmobile
- Presque Isle lease expires October 31, 2006
- Deteriorating branch facilities (Presque Isle, Millcreek, Edinboro)
- Telecommunications and electrical issues at some branches (Presque Isle, Millcreek, Edinboro)
- Some newer County-owned facilities (Blasco Library & Iroquois Avenue branch)

6. Funding

- Alternative funding sources for operating expenses
- Taxpayer resistance

7. Management

- Clerical staffing issues (staffing complement at several branches and bookmobiles not adequate to serve needs of patrons)
- Lack of managers in branches, Blasco, and in library administration
- Need for ongoing continuing education programs

8. Public Libraries of Erie County Shared Catalog Project

- Line between independent libraries and branches blurs
- Conflict of patron service policies between ECPL and independent libraries

SWOT Analysis

Why use SWOT Analysis?

A SWOT analysis is a self-analysis, an introspection of the internal health of an organization. A SWOT analysis also involves an environmental scan, an assessment of how external factors play a role in the health of the organization.

Understanding SWOT Analysis

SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats.

SWOT analysis is an effective way of identifying an organization's internal strengths and weaknesses and of examining the opportunities and threats faced externally. Carrying out a SWOT analysis helps focus our activities into areas where we are strong and where the greatest opportunities and threats lie.

A SWOT analysis gives us direction to identify and establish Strategic Priorities. Strategic Priorities are the overall general goal areas that an organization seeks to accomplish on the way to implementing its Mission and achieving its Vision for the Future.

How to use SWOT as a tool to develop Strategic Priorities and Plan

To carry out a SWOT analysis, write down the answers to the following questions. As appropriate, develop similar questions that relate to your organization.

Strengths:

- What advantages do we have?
- What do we do well?
- What relevant resources do we have access to?
- What do other people see as our strengths?

Consider these questions, and others, from your own point of view and from the point of view of the people you deal with. Don't be modest. Be realistic.

In looking at strengths, think about them in relation to your competitors. For example, if your competitors provide high-quality service, then high-quality service is not a strength - it is a necessity.

Weaknesses:

- What could you improve?
- What do you do badly?
- What should you avoid?

Again, consider this from an internal and external basis. Do other people seem to perceive weaknesses that you do not see? Are your competitors doing any better than you? It is important to be realistic now, and face any unpleasant truths as soon as possible.

Opportunities:

- What are the good opportunities facing you?
- What are the interesting and related trends you are aware of?

Useful opportunities can come from such things as:

- Changes in technology and markets on both a broad and narrow scale
- Changes in government policy related to your organization and Mission
- Changes in social patterns, population profiles, lifestyle changes, etc.
- Local events

A helpful approach to looking at opportunities is to look at your strengths and ask yourself whether these open up any opportunities. Alternatively, look at your weaknesses and ask yourself whether you could open up opportunities by eliminating them.

Threats:

- What obstacles do you face?
- What is your competition doing?
- Are the required specifications for your Mission, job, or services changing?
- Is changing technology threatening your position or Mission?
- Do you have personnel, infrastructure, financial resources, or customer problems?
- Could any of your weaknesses seriously threaten your Mission?

Carrying out a SWOT analysis is normally revealing to many stakeholders, both in terms of pointing out what needs to be done and in putting problems into perspective.

With the completion of a SWOT analysis, the next step in developing a Strategic Plan is to use the SWOT matrix, or listing, to identify and articulate Strategic Priorities.

In addition to a SWOT analysis, most highly effective organizations are cognizant of, and responsive to, emerging trends in the organization and the business across the country.

SWOT Analysis: Determining Strategic Priorities

Strengths of the Erie County Public Library

Dedicated and qualified staff

Volunteer support

Support of Erie County Government

Erie County Public Library's Blasco Memorial Library

ECPL Iroquois Branch

New circulation system

Local history, genealogy, and children's Collections

Electronic resources, e.g., POWER Library

Acquisition philosophy/policy

Bookmobile Services: Serving rural and urban locations

Public support

Children's programs

Community programs

Commonwealth Library support

Weaknesses of the Erie County Public Library

Limited/weak library materials collection in some subject areas

Lack of understanding, or misunderstanding, or need for increased sharing of library operations policies and practices

Staffing issues at Blasco and branch libraries

Inadequate/outdated branch library infrastructure

Incomplete policy and plan for the establishment of branch libraries

Inadequate and/or obsolete technology

Collective bargaining contract and process

Bookmobile issues

Media exposure and public relations

Opportunities for the Erie County Public Library

New circulation system

Public support

Surveys to determine citizens' interests in collection holdings, services, and programs

Updated technology

A fundraising capital campaign to add to/establish an endowment

The good will and support of the local media to promote the ECPL

Bookmobile services

ECPL Strategic Plan

ECPL stakeholders: Erie County Council
Erie County Executive and Administration
Erie County Public Library Administration and Staff
Friends of the Library
Library Foundation
Library Advisory Board

Blasco Endowment

ECPL Book Endowment

Inner-city and rural community outreach

Threats to the Erie County Public Library

Understanding of ECPL library operations practices and policies

Collection holdings and services

Balancing citizen interests and needs

Computer hardware and software

Current ECPL branch system, (e.g., collection, staff size, infrastructure)

Uncertainty of consistent State funding

Mission Statement: Purpose for the Existence of the ECPL

A Mission Statement is a collective statement by an organization's internal stakeholders describing their highest sense of purpose in serving citizens and society. Mission statements should state briefly and clearly the purpose of the organization and the reason the organization exists. In combination with a vibrant Vision Statement for the Future, the Mission Statement provides the foundation and framework for defining operational and strategic work.

Until this study and planning process, the last time a Mission Statement was articulated for the ECPL was in 1995. That 1995 Mission Statement is as follows:

1995 Mission

This mission of the Erie County Library is to act as a public, non-sectarian library serving the informational, educational and recreational needs of residents of Erie County, Pennsylvania, by collecting, organizing, preserving and making accessible a currently useful collection of books, printed and audiovisual materials, computer-based resources and other material with the assistance of a well-trained staff.

As an outcome of the 2005 Strategic Planning process, the Erie County Public Library Strategic Planning Committee stakeholders have redefined and clarified the Mission as follows:

Purpose for the Existence of the Erie County Public Library

Mission Statement

The Mission of the Erie County Public Library is to improve the quality of life of citizens by providing materials, services, and programs that promote education, cultural enrichment, and recreation.

Guiding Core Values

Guiding the work of the Erie County Public Library into the future will be our perpetual Core Values. Our *Guiding Core Values* are linked to the Library stakeholders' sense of character or integrity. Guiding Core Values relate to the fundamental purpose of the ECPL. Core Values, or principles or morals, are standards of behavior. Guiding Core Values are the essential and permanent convictions of an organization. Core Values are a set of guiding principles that have a deep and pervasive impact on how staff in the Erie County Public Library, and its stakeholders, think and act. Core values require no external justification. They have indispensable value and are of vital importance to those inside the organization and those who support its *Mission* and *Vision for the Future*. They are extremely powerful guiding principles.

Guiding Core Values are the spirit and soul of the organization. Core Values guide all stakeholder actions as they relate to implementing the day-to-day Mission of the ECPL. The core values, the ECPL philosophy, describe the undeviating character of the organization. Core Values comprise an unwavering "identity" that transcends new products and services, management fads, technological change, and individual leaders. The Guiding Core Values remain consistent in the ECPL even in a changing, diverse, and competitive world and workplace. The Library may develop new purposes, implement new strategies, and reorganize the main and branch site operations; however, the philosophy and ideology through its Guiding Core Values will remain intact. The Guiding Core Values are the cement that holds the Erie County Public Library together through time on its way to achieving its Vision for the Future.

After consideration, review, and discussion, the Erie County Public Library Strategic Planning Committee decided that the American Library Association Core Values closely align with the Guiding Core Values of the Erie County Public Library. Consequently, the consensus of the Committee was to adopt the ALA core values with modifications that reflect the uniqueness of the ECPL staff and Strategic Planning Committee stakeholders.

THE ERIE COUNTY PUBLIC LIBRARY GUIDING CORE VALUES:

- 1. ACCESS**
- 2. CONFIDENTIALITY/PRIVACY**
- 3. DEMOCRACY**
- 4. DIVERSITY**
- 5. EDUCATION AND LIFELONG LEARNING**
- 6. INTELLECTUAL FREEDOM**
- 7. PRESERVATION**
- 8. THE COMMON GOOD**
- 9. PROFESSIONALISM**
- 10. SERVICE**
- 11. SOCIAL RESPONSIBILITY**
- 12. STEWARDSHIP OF RESOURCES**

Description and Explanation of ECPL Guiding Core Values:

The following statements describe the Guiding Core Values of the Erie County Public Library. The Core Values bring a vibrancy and dynamic direction to our daily operation.

ACCESS. Information available, regardless of format or method of delivery, is made accessible to all citizens.

CONFIDENTIALITY/PRIVACY. The ECPL is committed to maintaining user confidentiality and privacy as a fundamental right for intellectual freedom.

DEMOCRACY. The ECPL is committed to our government in which the power is vested in the people and exercised by them through a system of representation. To support and promote democracy, the ECPL is committed to educating citizens and encouraging civic engagement.

DIVERSITY. The ECPL values and respects human diversity. The resources and services the ECPL provides are meant to meet the needs of the community.

EDUCATION AND LIFELONG LEARNING. The ECPL is committed to encouraging citizens to be lifelong learners. The ECPL is committed to partner, and collaborate, with K-12, post-secondary education, and private and special libraries to encourage an educated citizenry.

INTELLECTUAL FREEDOM. The ECPL will resist efforts to censor resources.

COMMON GOOD. The ECPL affirms that libraries are an essential public good and are fundamental institutions that require support and use in a democratic society.

PRESERVATION. The ECPL is committed to acquiring and preserving information from the past and from the frontiers of knowledge.

PROFESSIONALISM. The ECPL is committed to having a qualified professional staff, through continuous learning, with the expertise and skills needed to refine collections and teach and assist the public in an information and technology age.

SERVICE. The ECPL staff is committed to providing the highest quality service to all library users. Library staff are navigators, not gatekeepers.

SOCIAL RESPONSIBILITIES. The ECPL provides information to educate citizens on the critical issues of society.

STEWARDSHIP OF RESOURCES. The ECPL staff is dedicated to the efficient and effective use of resources, i.e., holdings, financial, infrastructure, and personnel. ECPL accepts responsibility of the public's trust and is accountable for its actions.

Vision for the Future

Purpose of a Vision Statement

Visioning, and developing a *Vision for the Future Statement*, is an essential step in the strategic planning process.

A Vision Statement describes what your organization wants, and plans, to become in the future. A Vision Statement should bond all members of the organization and stakeholders and help them feel proud, energized, and excited about being part a dynamic plan for the future.

A Vision Statement should expand and go beyond the organization's current capabilities and image of itself. It gives shape and direction to the organization's future. Visions should normally be shorter, one to several sentences, so people will remember them easier. A Vision states what the organization looks like when it achieves it ultimate purpose.

Key Components of a Vision Statement

A Vision encompasses beliefs.

- Beliefs must meet your organizational goals as well as community goals.
- Beliefs are a statement of your values.
- Beliefs are a public and visible declaration of your expected outcomes.
- Beliefs must be precise and practical.
- Beliefs will guide the actions of all involved.
- Beliefs reflect the knowledge, philosophy, and actions of all.
- Beliefs are a key component of strategic planning.

Benefits of Visioning and Developing a Vision Statement

The process and outcomes of visioning may initially seem ambiguous and unnecessary. The benefits to visioning and to the strategic planning process are essential. Visioning

- Breaks people out of boundary thinking.
- Provides continuity and avoids the stutter effect of planning fits and starts.
- Identifies direction and purpose.
- Alerts stakeholders to needed change.
- Promotes interest and commitment.
- Promotes laser-like focus.
- Encourages openness to unique and creative solutions.
- Encourages and builds confidence.
- Builds loyalty through involvement and ownership.
- Results in efficiency and productivity.

Vision Killers

The following behaviors in the visioning process are vision killers:

- Tradition and resistance to change
- Fear of ridicule
- Stereotypes of people, conditions, roles, and governing councils
- Complacency of some stakeholders
- Fatigued leaders
- Short-term thinking
- "Naysayers"

Creating and Writing an Effective Vision Statement for the Future

A Vision Statement is more philosophical and abstract than a Mission Statement. A Vision Statement “paints a picture on a new white canvas” of an ideal future outcome. A Vision Statement inspires; a Mission Statement provides immediate and direct guidance.

An athlete might have a vision of accepting an award for being the best. Her Vision Statement would describe this event. In the 1980s, the founder of Microsoft, Bill Gates, had a futuristic vision: "To see a computer on every desk, a computer that he produced."

An effective Vision Statement is:

- clear and unambiguous
- paints a vivid picture
- describes the future
- is memorable and engaging
- involves aspirations that are realistic
- is aligned with the organization’s values and culture
- is driven by customer needs for the organization

To be effective, a Vision Statement must be assimilated into the organization’s culture. It is the leader's responsibility to communicate the vision regularly, create narratives that illustrate the vision, act as a role model by embodying the vision, create short-term objectives that are compatible with the vision, and encourage others to create their own personal vision compatible with the organization's overall vision.

Vision for the Future of the Erie County Public Library

The Erie County Public Library is recognized as a center and source of information, a place to gather to discuss and learn, the encourager of reading, and the leader in collaboration with other libraries, with County municipalities, schools, non-profits, and business and industry. The ECPL is the gateway to lifelong learning, offering a full spectrum of materials, programs, and services.

MISSION STATEMENT

The Mission of the Erie County Public Library is to improve the quality of life of citizens by providing materials, services, and programs that promote education, cultural enrichment, and recreation.

GUIDING CORE VALUES

The **Guiding Core Values** give a direction to our daily operational decision making. Core Values are the soul of the organization. They relate to achieving our Mission and Vision for the Future.

ACCESS. Information available, regardless of format or method of delivery, is made accessible to all citizens.

CONFIDENTIALITY/PRIVACY. The ECPL is committed to maintaining user confidentiality and privacy as a fundamental right for intellectual freedom.

DEMOCRACY. The ECPL is committed to our government in which the power is vested in the people and exercised by them through a system of representation. To support and promote democracy, the ECPL is committed to educating citizens and encouraging civic engagement.

DIVERSITY. The ECPL values and respects human diversity. The resources and services the ECPL provides are meant to meet the needs of the community.

EDUCATION AND LIFELONG LEARNING. The ECPL is committed to encouraging citizens to be lifelong learners. The ECPL is committed to partner, and collaborate, with K-12, post-secondary education, and private and special libraries to encourage an educated citizenry.

INTELLECTUAL FREEDOM. The ECPL will resist efforts to censor resources.

COMMON GOOD. The ECPL affirms that libraries are an essential public good and are fundamental institutions that require support and use in a democratic society.

PRESERVATION. The ECPL is committed to acquiring and preserving information from the past and from the frontiers of knowledge.

PROFESSIONALISM. The ECPL is committed to having a qualified professional staff, through continuous learning, with the expertise and skills needed to refine collections and teach and assist the public in an information and technology age.

SERVICE. The ECPL staff is committed to providing the highest quality service to all library users. Library staff are navigators, not gatekeepers.

SOCIAL RESPONSIBILITIES. The ECPL provides information to educate citizens on the critical issues of society.

STEWARDSHIP OF RESOURCES. The ECPL staff is dedicated to the efficient and effective use of resources, i.e., holdings, financial, infrastructure, and personnel. ECPL accepts responsibility of the public's trust and is accountable for its actions.

VISION FOR THE FUTURE

The Erie County Public Library is recognized as a center and source of information, a place to gather to discuss and learn, the encourager of reading, and the leader in collaboration with other libraries, with County Municipalities, schools, non-profits and business and industry. The ECPL is the gateway to lifelong learning, offering a full spectrum of materials, programs, and services.

Strategic Priority Vision Statements, Goals, & Action Plans

Strategic Priority Vision Statements

An organization increases its likelihood of successful adaptation to change by developing a set of critical Strategic Priority Vision Statements. Strategic Priority Vision Statements are identified to guide and implement an organization's Mission and to achieve its Vision for the Future.

Strategic Priorities are the fundamental issues the organization has to achieve to implement its Mission and move towards its desired future. Strategic Priorities focus on concerns or barriers to success, which must be addressed.

Strategic Priority Vision Statements describe specific planning challenges that are identified from a previous SWOT analysis, carried out in the strategic planning process, and review of emerging trends in the organization's business. *(The ECPL also has the recommendations from two earlier planning reports that can be used in developing its Strategic Priorities, i.e., the Alloway and Browa Report, 2004 and the ECPL Analysis and Plan: 1998.)*

The list of Strategic Planning Vision Statements should provide a path to follow by which the organization will link its Mission Statement and Guiding Core Values to achieve its compelling Vision Statement for the Future.

Creating and achieving an optimal future requires investing resources, e.g., human, financial, technological, and infrastructure.

Goals

Goals need to be developed for each Strategic Priority Vision Statement. A goal is a general statement that points toward the future. A goal is a milestone the organization aims to achieve that evolves from the strategic priority vision statement.

Goals challenge an organization to be more responsive to its internal and external environment, as outlined in the SWOT analysis and list of emerging trends, to achieve its desired future.

A goal is general enough that it can't be easily measured. Goals are compelling directives that translate into tangible focused activities.

Actions Plans

An action plan (objective) is a way to achieve a goal. An action plan is a sub-set of a goal. An action plan can be easily measured. An action plan can be assigned to someone to implement. An action plan can be assigned a deadline date for completion. Action plans require resources to achieve goals, i.e., personnel and financial.

STRATEGIC PRIORITY 1. BRANCH LIBRARIES

Introduction

The purpose of the *Branch Libraries Strategic Priority Direction Plan* is to establish goals and action plans to ensure Erie County citizens have maximum access to public library services through branch libraries.

The Erie County Public Library and its stakeholders have a strong commitment to providing branch libraries at each County site that needs access to Library services. Branch library sites will be located in high density population or growing population areas. Consideration will also be given to sites with personal and public transportation access, pedestrian access, and diverse population demographics. The 2005 Strategic Planning Committee also gave consideration to earlier consultants' reports completed in 1998 and 2004 in determining the number and location of branches.

Because of limited resources, it is understood that not all potential sites can be selected to build or maintain branch libraries. Further, it is understood that the location of branch libraries has been a matter of great concern among library stakeholders and citizens for years, and any decision on location and support will please some individuals and not others. Despite this dilemma, the ECPL stakeholders, through the Strategic Planning Committee and the Library Foundation site analysis, pledge to make branch library location and support recommendations for Erie County Council ratification or amendment.

Evaluation and Continuous Strategic Planning

Branch library location, number, size, and support will be a priority issue for continuous review and action by the Erie County Public Library and its stakeholders. The ultimate goal, although not a short-range budgetary reality, is to construct and support "full service" branch libraries at each needed location, up to five sites in the long-range future, throughout the County.

The Branch Libraries Strategic Priority Direction Plan will be reviewed annually and revised as goals and action plans are accomplished and new goals are identified. An inclusive participatory process with the ECPL stakeholders (the Strategic Planning Committee) will be utilized to undertake a thorough review and revision of the existing Branch Libraries Strategic Direction Plan. Based upon input by all relevant parties, a detailed revision of this document will be developed and implemented.

Completion of the goals and actions plans and items listed in the plan and timeline portion of this document will serve as a measurement of success. Measuring ongoing or developmental strategies will be harder, but feedback from patrons and staff in the form of surveys, anecdotal information, and staff observations will help determine the impact of the directions chosen. The branch library development efforts outlined in this plan will be pursued to increase patron satisfaction.

The library will undergo a continuous, rolling, strategic planning process. The Strategic Planning Committee will continue to work to develop an understanding of future branch library needs of the County and to refine this plan to meet those needs. In order to accomplish all of the goals in this plan, the Committee recognizes that additional, special, funding will be needed to achieve new and revised goals for branch libraries. It will take more than one budget cycle, and special budget allocations and funding, to accomplish all branch library goals.

BRANCH LIBRARY STRATEGIC PRIORITY DIRECTION STATEMENT

The Erie County Public Library stakeholders will research the need, use resources available, and implement timely plans to provide the needed number of branch libraries in Erie County to ensure maximum access to public library services.

ECPL Branch libraries will provide at a minimum:

- 1. Infrastructure size of 6,000 – 8,000 square feet, with room for growth.**
- 2. Collection size of at least 40,000 holdings.**
- 3. Appropriate technology infrastructure, including wiring, hardware, and software.**
- 4. 45 - 54 operating hours per week, including nights and weekends.**
- 5. Staffing minimum of four full time and two part-time clerical staff.**

An additional full-time branch manager will be added to the central Library Administration, making a total of two countywide. Each branch manager will be assigned specific branches within the system.

Addendum: As of 2009, there is still only one branch manager assigned to oversee operations at the branches of the Erie County Public Library. The branch manager general duties are as follows:

- 1. Scheduling and supervising 24 people working two shifts, six days a week across four disparate locations.***
- 2. Overseeing branch maintenance and operations—again at four separate buildings.***
- 3. Overseeing collections and equipment at all four branches.***
- 4. Acting as the “consumer service” liaison to the general public in the event of questions, problems, complaints, accidents or other incidents.***
- 5. Functioning as a member of the Library Administrative Team.***

Relegating these roles to just one person inevitably results in poor stewardship of County resources. The Strategic Planning Committee urges the County to rectify this situation as soon as possible and resolve the managerial shortage.

Goal 1. Implement “Phase I” of the branch library strategic plan that replaces the Millcreek Mall, West Erie Plaza and Edinboro branches and enhances the Iroquois Branch.

Action Plans

1. Replace the current Presque Isle Branch, at West Erie Plaza, with a west area Erie County branch.

Identify the site location by December 30, 2005. Extend the current Presque Isle Branch Library lease that ends October 31, 2006 until October 31, 2007.

Establish a related fund-raising program by January 3, 2006, and complete the branch library funding phase in time to begin building construction.

Begin the new branch library building construction to permit it to open by October 2007.

Responsible person(s): Strategic Planning Committee, Library Foundation, County Administration, County Council

Addendum: The Erie County Public Library Foundation acquired a three acre parcel of property in September 2006 for the West County Library Branch, located at the intersection of Manchester and West Lake Roads. Construction on the new West County branch library began late in 2008, and is projected to be complete by July 2009. The Erie County Public Library staff will work over the summer to prepare collections at the Presque Isle Branch Library for the move to the new location. The West County Library Branch is scheduled to open to the public sometime in the fall of 2009.

2. Replace the Millcreek Branch, at Millcreek Mall, with a south-central area Erie County branch.

Identify the site location by January, 2008. The current Mall lease is up on July 31, 2010.

Establish a related fund-raising program by January 3, 2008, and complete the branch library funding phase in time to begin building construction.

Begin the new branch library building construction to permit it to open in July 2010.

Responsible person(s): Strategic Planning Committee, Library Foundation, County Administration, County Council

Addendum: The Millcreek Mall owners approached the library in April 2008, with a proposal to relocate the library to a vacant space within the Millcreek Pavilion, located on Interchange Road. The proposal gave the

Library an additional 2,000 square feet at the same price the County would have paid for rent in the old Millcreek Mall location.

The new Millcreek Pavilion library location was renovated through June 2008. The Millcreek Mall Branch Library's last day of operation was July 3, 2008. The Millcreek Branch Library reopened to the public in the Millcreek Pavilion on September 5, 2008.

Circulation at the Millcreek Branch Library has increased by an average of approximately 40% since the relocation. Library patrons comment frequently on the bright, cheerful, inviting space and updated collections, as well as the improved parking for the library.

Due to the success of the Millcreek Branch Library in the new location, there are no plans presently to relocate the branch into a freestanding building. The County is committed to the lease in the Millcreek Pavilion through at least 2015.

3. Replace the Edinboro Branch, currently in the Edinboro Boro Building, with a south area Erie County branch.

Identify the site location by January 2010. The Edinboro Branch has no lease restrictions and is located in the Edinboro Boro Building free of charge.

Establish a related fund-raising program by January 3, 2010, and complete the branch library funding phase in time to begin building construction.

Begin the new branch library building construction to permit it to open in October 2011.

Responsible person(s): Strategic Planning Committee, Library Foundation, County Administration, County Council

Addendum: *In January 2007, the Library Foundation purchased condominium space at the former House of Edinboro, located conveniently on Route 6N (413 West Plum Street) in Edinboro. The structure has a long history in Edinboro, as it was once the Culbertson Stables, before it was converted for furniture manufacturing and sales.*

Construction was completed at the end of October 2008, and the Edinboro Branch Library reopened in its new location at 413 West Plum Street on December 17, 2008.

As with the relocated Millcreek Branch Library, circulation is booming at the new facility. With the much improved facility and hours of operation, circulation has increased by more than 70% over the previous year.

4. Upgrade the current Iroquois Branch at 4212 Iroquois Avenue.

Meet the branch library staffing standard by January 1, 2008.

Improve the traffic flow patterns for patron and staff access by December 2007.

Improve the signage to market the branch library and inform patrons by August 2006.

Responsible person(s): Strategic Planning Committee, Library Foundation, County Administration, County Council

Addendum: *The branch staffing standard of four full time and two part time staff has been met. The cost of reworking the traffic flow in and out of the branch has, to date, prevented this action plan from becoming a reality.*

Goal 2. Implement “Phase 2” of the Strategic Branch Library Plan by assessing the community need and financial constraints for a fifth branch. If the need for the fifth branch exists, identification of an appropriate site and commencement of fund raising should begin.

Action Plans

1. Assess the community need and financial constraints for a fifth branch library by January 2012.

Identify the site locations for “Phase 2” by June 2012.

Establish a related fund raising program by June 2012, and complete the branch library funding phase in time to begin building construction.

Begin the new branch library building construction to permit it to open in 2014.

Responsible person(s): Strategic Planning Committee, Library Foundation, County Administration, County Council

Addendum: *While budget constraints have delayed consideration of a fifth library branch, the concept has not been rejected or postponed indefinitely. The Library Strategic Planning Committee will continue to evaluate and assess the need for a fifth branch library, contingent upon community interest and long term fundraising progress.*

Goal 3. Establish a comprehensive community relations campaign to educate citizens on the need, and efforts, to establish and maintain ECPL branch libraries.

Action Plans See the Community Relations and Marketing Strategic Priority

STRATEGIC PRIORITY 2. TECHNOLOGY

Introduction

The overall purpose of the *ECPL Technology Strategic Priority Direction Plan* is to establish and achieve goals and objectives to facilitate the improvement of patron use of public library services and improved efficiency and effectiveness of library staff. Erie County Public Library (ECPL) has a strong commitment to the integration of technology into its programs and services to implement its Mission and achieve its Vision for the Future.

Evaluation and Continuous Strategic Planning

The Technology Strategic Priority Plan will be reviewed every two years, and revised as goals are accomplished and new goal areas are identified. No later than August of the second year (2007), an inclusive participatory process with the ECPL stakeholders (the Strategic Planning Committee) will be utilized to undertake a thorough review and revision of the Technology Plan. Based upon appropriate input by all relevant parties, a detailed revision of the document will be developed and implemented.

The Strategic Planning Committee will continue to work to develop an understanding of future technology needs and new functions for library automation, and to refine this plan to meet those needs. In order to accomplish all of the goals in this plan, the Committee recognizes that additional funding may be needed for staff training, equipment replacement, and staff to coordinate many of these efforts. It may take more than one budget cycle to accomplish all of these goals.

Completion of the actions plans and items listed in the timeline portion of this document will serve as a measure of success. Measuring ongoing or developmental strategies will be harder, but feedback from patrons and staff in the form of surveys, anecdotal information and staff observations will help us determine the impact of the directions we choose. The library will undergo a continuous, rolling, strategic planning process. The technological development and cooperative efforts outlined in this plan will be pursued to increase patron satisfaction.

Technology Budget

Budget deliberations among the various library sections are ongoing and include support for a technology budget to meet some of the objectives listed here. Concerted efforts will be made to obtain an inflationary and technology use increase in the budget line in subsequent year budgets.

The Strategic Planning Committee and Library management have also been discussing alternative sources of funding for some of the initiatives listed here. Funds may be sought from capital campaigns, library budget increase requests, grant funds, federal and state discount programs, the Erie County Public Library Foundation, or individual donors.

TECHNOLOGY STRATEGIC PRIORITY VISION STATEMENT

The Erie County Public Library will research, provide, and use current and emerging technology resources in order to provide both basic and enhanced library services to the citizens of Erie County. *

Goal 1. Implement equipment replacement and upgrade procedures to be responsive to changing technology and public service needs.

Action Plans

1. Develop an annual recommendation for planned replacement of outdated or failing desktop and public access workstations, including refinement of criteria for deciding when and where to add staff and public access desktops.
Completion deadline: 4th Qrt. 2005
Responsible person: Computer Department Staff
2. Request that the Library budget includes funding to replace approximately 25% of computer workstations each year, including servers and any expanded access that may be needed to accomplish other goals.
Completion Deadline: 4th Qrt. 2005 for 2006 Budget
Responsible person: Library Director, County Finance, County Council
3. Provide trained staff for the setup, maintenance, and repair of hardware.
Completion deadline: 3rd Qrt. 2006 review Technical Assistant job descriptions/necessary upgrades
Responsible person: Technology Coordinator, Library Director

Addendum: Computer equipment that was older than five years was replaced at Edinboro, Millcreek and Iroquois. At Blasco, over a three year period from 2006 to 2009, the Internet lab computers were replaced as well as all staff computers. In the past the professional staff had to share computers. Additional computers were purchased to provide each full time professional staff member with their own workstation. The adult services librarians received their computers in 2008. The children's librarians were assigned computers in 2009.

In 2008 a new budget line for computers was added to the branch budgets. This line was included in the 2009 budget as well. With these funds we were able to upgrade the branch computers, add a wireless router at each branch but Presque Isle, and purchase some equipment for RFID checkout and checkin of materials at Millcreek.

In future budgets, funding for branch computer equipment needs to continue and funding for computers for the Blasco library needs to be added.

The Technology Staff continues to be made up of two full time Technology Assistants and one half time Technology Assistant. One Technology Assistant has advanced

networking skills and creates and maintains the web page. The 2.5 positions are responsible for the installation and maintenance of all computers at Blasco, the four branches of ECPL. They also install, troubleshoot and repair computers at the six Independent Libraries in Erie County as part of the Shared Catalog agreement with those libraries.

Goal 2. Plan for and implement needed software upgrades and purchases.

Action Plans

1. Develop a planned program for upgrades to the operating system software on the web server.
Completion deadline: 4th Qrt. 2005
Responsible person: Computer Department
2. Develop standards for productivity software to simplify technical support and training issues.
Completion deadline: 1st Qrt. 2006
Responsible person: Computer and Library Staff
3. Develop a plan for productivity software upgrades and purchases. Establish criteria for need and procedures for decision-making.
Completion deadline: 3rd Qrt. 2006
Responsible person: Computer Staff, Library Director
4. Work with County Information Services staff to study Library software needs for efficiency of repetitive record-keeping tasks such as payroll and inventory.
Completion deadline: 4th Qrt. 2006
Responsible person: Library Director, Business Office Staff, County Government Representatives

Addendum: *Our goal is to replace or upgrade servers, staff and circulation computers every five years. Catalog PC's that are used only to connect to the iBistro catalog are older than five years.*

A new web server was purchased at the end of 2006 and installed at the beginning of 2007.

The Technology Assistants experimented with different remote access software. They found Log-me-in that allows them to connect to one PC at each branch to remotely work on problems with the Internet computers. This software was available free for our current level of use. It has proven useful and has cut down on some of the traveling.

A replacement for the shared file server was purchased at the end of 2008. The number of user licenses was expanded to include all of the librarians as well as the business

office, administrative staff and managers. The librarians will be better able to share files. All files will be backed up daily to prevent loss of projects such as the obituary files. The business office staff created payroll spreadsheets that are located on the shared server. Managers can now enter their payroll on line instead of writing it on payroll sheets. The business office staff prints and reviews each spreadsheet makes whatever adjustments needed and sends the printed sheet to the county payroll office where it has to manually be entered on the payroll system.

The business office staff also created on-line leave time sheets that are available on the shared server. Managers have access to these files to verify the amount of leave time available for staff. Previously, all leave time was noted on paper and a call had to be made to business office staff for verification of leave time balances.

County inventory continues to be a cumbersome process. Printouts containing lists of library furnishings and equipment are sent to the library once a year where staff verify that each piece is still in place. The updating process is done on paper and sent to the county accounting/finance office. It is a very time consuming process.

There has not been a county-wide effort to further automate payroll, staff leave record access or inventory.

Goal 3: To continue the automation of technical services processes and refine the materials database to provide patrons with concise search results.

Action Plans:

1. Further automate the book ordering process by completing the Sirsi/Baker and Taylor grid ordering setup.
Completion deadline: 4th Qrt. 2005
Responsible person: Computer Department, Technical Service, Librarians
2. Access the need for a title de-duplication project. Determine if corrections can be done in-house or need to be out-sourced. Determine costs.
Completion deadline: 1st Qrt. 2006
Responsible person: Technical Services
3. Work to plan strategies for cooperative cataloging that will decrease the occurrence of duplicate entries and best meet the needs of all participants in an automation network.
Completion deadline: 4th Qrt. 2006
Responsible person: Technical Services Manager, Technology Coordinator, Independent Libraries Staff
4. Access the need for cleanup of the authority record database. Determine if corrections can be done in-house or need to be outsourced. Determine costs.

Completion deadline: 3rd Qrt./2006
Responsible person: Manager of Technical Services

Addendum: “Grid” ordering was established with the library’s main book jobber, Baker and Taylor in 2005. Grid ordering further automates the ordering process by giving the librarians the ability to input fund codes, agencies and locations at the point of selecting the materials to be ordered. The titles along with this order information are then downloaded into the library’s computer system and made immediately available to library patrons via the on-line catalog. Prior to “grid ordering, a technical services clerk had to manually enter the order line information for each title ordered.

A title de-duplication project was completed in 2006.

The Access Pa database was added as a Z39.50 connection to the Smartport cataloging software for the Independent Erie County Libraries. This free service has resulted in those libraries finding higher quality MARC records on-line for new materials and less need for the creation of short catalog records.

Costs were obtained for the cleanup of the authority records in the Shared Catalog. This project has not yet been undertaken due to lack of funding. Once done it is suggested that the authority database be maintained by subscribing to a service that provides updated authority records on a weekly or monthly basis.

Goal 4: To integrate appropriate technologies into library public services.

Action Plans:

1. Provide the patrons with individual instruction and group training programs in the use of new technologies and information resources.
Completion deadline: 3rd Qrt. 2006
Responsible person: Public Service Staff

2. Provide sufficient staff support for Hypertext Markup Language (HTML) support.
Completion deadline: 4th Qrt. 2006
Responsible person: Computer Department Staff (education funding required)

3. Develop a plan to evaluate the impact of new electronic formats and technologies on library services and collections.
Completion deadline: 2nd Qrt. 2006
Responsible person: Blasco Coordinator, Library Staff

4. In order to accurately reflect total Library services, refine methodology for measuring the use of electronic services and reporting data as part of Library output.

Completion deadline: 2nd Qrt. 2006

Responsible person: Blasco Coordinator, Computer Department

5. Evaluate the use of new technologies to increase services and reduce costs such as patron self check and automated renewal systems.

Completion deadline: 3rd Qrt. 2006 (inclusion 2007 budget)

Responsible person: Library Director

Addendum: *Public Internet and Microsoft Office classes are conducted on a regular basis. Funding is provided by the Friends of the Library to hire teachers from outside of the library staff.*

The Blasco librarians received training on the newest Office 2007 software. This training was paid for with funds from the library budget in 2008. There is a need for on-going public and staff training in the latest software and Internet trends. The library should continue to investigate funds for either a contracted trainer or a half-time staff member who could conduct the training sessions.

One Technology Assistant is proficient in HTML language and webpage construction.

New electronic formats are continually reviewed by the Blasco Coordinator in accordance with the collection development plan that was revised in March 2008.

Usage of electronic resources is tracked in monthly ECPL reports and annual state reports. These statistics are obtain through each database vendor who are not always consistent in there methods of measuring usage. There has been an improvement in this reporting since 2007.

Phone in renewal and hold notification was implemented in 2007. E-mail of hold notices was implemented in 2008.

To prepare for the possibility of patron self-checkout and checkin at the new branch libraries radio Frequency Identity (RFID) tags were added to branch collections when they moved to new facilities. Audio-visual collections were also repackaged with security cases that can be un-locked by the self-checkout unit. To fully implement this service, the library needs a merchant account so patrons can self-pay for fines and fees during the checkout/checkin process. Funding for the self-checkout units was not in the building funds or the county budget for the library.

Goal 5: To enhance the Library's role as a community leader using technology and in technology training.

Action Plans:

1. Work with the County Government and agencies in the development of community-based information systems.

- Completion deadline: 1st Qrt. 2007
 Responsible person: Library Director, County Administration
2. Provide leadership, training and coordination of community efforts to maximize citizen access to information.
 Completion deadline: 1st Qrt.2007
 Responsible person: Blasco Coordinator, Public Service Staff
 3. Consider training that might be provided by ECPL staff to meet the needs of external groups, such as librarians, County employees, and the general public.
 Completion deadline: 2nd Qrt. 2007
 Responsible person: Blasco Coordinator, Public Service Staff

Addendum: *The Blasco Adult Services manager coordinates training for non-profit organizations in the operation of Foundation Software. This software is valuable for locating sources for grants. Also, the Adult Services manager collaborates with the Erie Society for Genealogical Research. She conducts a seminar at the history center on what materials and databases for genealogy research are available at Blasco and coordinates an annual presentation with a headlined outside speaker.*

Any further programming is prohibitive due to lack of budget funding and cutbacks in the professional librarian staff.

Goal 6: To evaluate and take advantage of appropriate state and federal initiatives

Action Plans:

1. Work with the Commonwealth Libraries in statewide efforts to establish connections among shared automation systems.
 Completion deadline: 4th Qrt. 2006
 Responsible person: District Consultant
2. Develop staff grant writing skills and submit several grants each year.
 Completion deadline: 2nd Qrt. 2006
 Responsible Person: Management staff
3. Encourage efforts to initiate and continue to take advantage of statewide contracts for electronic reference products and other technology applications.
 Completion deadline: 2nd Qrt. 2006
 Responsible Person: District Consultant

Addendum: *No progress has been made in efforts to establish connections among shared automation systems.*

Nothing has been done to develop staff grant writing skills. However, grants written by the Library Foundation Development Consultant have benefited the new branch libraries.

The Power Library databases and Access PA state-wide catalog continue to be supported by the state of Pennsylvania

Goal. 7: To further develop the library's web-based services in relation to other library public services, and work to increase the usefulness of the library website.

Action Plans:

1. Develop standards and templates for the web mastering and HTML support functions for the ECPL, County Government, and agency web sites.
Completion Deadline: 4th Qrt 2006
Responsible Person: Technology Coordinator, County Government
2. Evaluate current web-based services and plan for additional services. Consider the potential for combining web-based services with other agencies.
Completion Deadline: 4th Qrt. 2005
Responsible Person: Committee, Library Departments
3. Increase interactive web-based activities in the public service departments of the library. Consider making the ECPL website a portal.
Completion Deadline: 4th Qrt 2005
Responsible Person: Committee, Library Departments
4. Develop a marketing campaign to raise awareness in the community of what the library's web site has to offer the community.
Deadline: 3rd Qrt 2006
Responsible Person: Blasco Coordinator, Public service staff

Addendum: *An on-line survey about the library web page was posted at the beginning of 2009 in preparation for re-design of the site. Further feed back from the public will be solicited. Responses to the on-line survey indicate that most users of the on-line catalog and web page are not aware of the databases or services offered by the library.*

A marketing campaign was developed by the Erie County District Libraries under the leadership of the Blasco Library District Consultant. It can be used at the local, county or district level. Logo, slogan and ad campaigns are completed. The district is looking for funding to put the campaign into action.

Goal 8: To address the training and information needs of the ECPL staff.

Action Plans:

1. Further assess training needs of ECPL staff. Survey supervisors regarding staff training needs. Seek funding to provide needed training and to provide staff to coordinate in-house training activities.

Completion deadline: 4th Qrt 2005
Responsible Person: District Consultant

2. Maintain staff competencies in Local Area Network (LAN) navigation and conventions.

Completion deadline: 1st Qrt 2007
Responsible Person: Technology Assistants

3. Develop training programs in the use of specific applications.

Completion Deadline: 3rd Qrt. 2006/based on findings of Action Plan #1
Responsible Person: District Consultant, Library Director, Technology Coordinator

Addendum: Automation training has been conducted sporadically since 2005. The software upgrade of the integrated library circulation system in 2005 required a system-wide training of all staff in the use of the new software as well as the Windows operating system. Since then some staff have received training on some Microsoft Office applications. Funds for training need to be increased to provide on-going training for all staff.

Goal 9: To implement a technology budget that will support the technology needs of the Library.

Action Plans:

1. Develop an equipment budget adequate for timely maintenance and replacement of existing equipment and purchasing new equipment as needed to support library services.

Completion Deadline: 4th Qrt. 2005
Responsible Person: Library Director, Technology Coordinator, County Finance, County Council

2. Develop alternative funding sources to support technology innovations, including capital campaigns, library budget increase requests, grant funds, federal and state discount programs, the ECPL Foundation, Friends of the Library, and individual donors.

Completion Deadline: 4th Qrt. 2006
Responsible Person: Library Director.

Addendum: In 2008 a Branch Technology budget line was added to each branch's budget. This funding provided for the replacement of public and staff computers as well

as the addition of a wireless controller for public laptop use at three of the four branches. The Branch Technology budget line was also funded in 2009.

The Blasco Library does not have a technology budget specified for the replacement of equipment. This needs to be incorporated into future budgets.

The Bill and Melinda Gates Foundation provided public computer grants for the Edinboro and Iroquois Branches in 2008 and 2009. The Erie Community Foundation awarded a computer equipment grant to the Fairview Branch that is currently under construction.

Goal 10: To implement an evaluation process of the technology projects of the Library.

Action Plans:

1. Solicit feedback from patrons, from a face-to-face survey and/or via our web site, on an annual basis that addresses their satisfaction with the technology services we offer and the types of technology services and training they would like to see in the Library.

Completion deadline: 4th Qrt. 2005

Responsible Person: Technology Department, Blasco
Coordinator, Public Services Staff

2. Cooperatively develop with staff a list of core competencies for various staff levels in the library and test on these competencies before and after training sessions to gauge the increase in skill sets. Modify training as needed to reach the goal of a staff that fully meets the core competencies.

Completion deadline: 3rd Qrt. 2007

Responsible Person: Library Managers , Coordinators

- * The Strategic Planning Committee understands that the Goals and Action Plans may be limited by available County budgets.

Addendum: *An on-line survey was conducted regarding web-site use in 2009. A focus group on the same subject is in our plans for later in 2009.*

The following are still appropriate on-going goals for library technology. In addition we should be searching for ways to increase the telecommunication bandwidth to each ECPL outlet and Erie County Independent Libraries and search for funding to support the on-going costs of this increased bandwidth.

On-going projects that occur throughout each year:

1. Cooperate with County Government in upgrading, maintaining, and providing services via LAN and Internet.

2. Assess new technologies and evaluate their usefulness in improving access to the Library's collections.
3. Review new electronic formats and services for inclusion in service offerings.
4. Maintain an awareness of the availability and usefulness of electronic reference resources, such as full text periodical databases and indexes, and provide access to them as appropriate. (Awareness provided by Librarians and marketing; access set up by the computer department.)
5. Seek appropriate telecommunications discounts under FCC rulings.
6. Work with County Government to identify and take advantage of appropriate

STRATEGIC PRIORITY 3. FUNDING AND FINANCE

Introduction

The purpose of the *Funding and Finance Strategic Priority Direction Plan* is to establish goals and action plans to ensure that the Erie County Public Library and branches have adequate funding to support their infrastructure and library service delivery.

The ECPL is primarily funded by the County in partnership with the Commonwealth of Pennsylvania. In 2004, the Library operating budget was \$5,426,228 for core Erie County Library operations. In that total, \$1,391,950 came from federal and state grants. The Erie County Administration and Council have a history of reaching to meet the special needs of ECPL with base funding from County funds. This public revenue base funding source will continue to be requested and used.

The ECPL stakeholders have a strong commitment to enhancing the traditional source of public funding with alternative sources of revenue within public library constraints. The ECPL Strategic Planning Committee stakeholders will creatively explore alternatives to generate additional revenue sources to deliver services. At the same time, the ECPL will continue to seek to provide enhanced infrastructure and enriched delivery of library services in the most cost-efficient manner. The ECPL stakeholders will also monitor the community's investments in Library infrastructure and services and report the Library's benefits to the community.

Evaluation and Continuous Strategic Planning

Funding and finance will be a priority issue for continuous review and action by the ECPL Strategic Planning Committee stakeholders. The ultimate goal is to ensure that the Erie County Public Library and branches have adequate funding available to support Library service delivery in well maintained and highly functional infrastructures (Library buildings).

The Funding and Finance Strategic Priority Direction Plan will be reviewed continuously and revised annually, by July 31, as goals and action plans are accomplished and new goals and action plans are identified and established. An inclusive participatory process with the ECPL stakeholders, the Strategic Planning Committee, will be utilized to undertake an annual review and revision of the existing Funding and Finance Strategic Priority Direction Plan. Based upon input by all relevant parties, a detailed revision of this document will be developed and implemented.

Completion of the goals and actions plans and items listed in the plan and timeline portion of this document will serve as a measurement of success. Measuring ongoing and developing strategies will be harder, but feedback from patrons and staff in the form of surveys, anecdotal information, and staff observations will help determine the impact of the unfolding direction. The funding and finance library development efforts outlined in this plan will be pursued to increase patron satisfaction.

The ECPL will pursue a continuous strategic planning process. The Strategic Planning Committee will continue to work to develop an understanding of future funding and finance needs of the ECPL and to refine this plan to meet those needs. In order to accomplish all goals in the Strategic Plan, the Committee recognizes that additional, special, funding will be needed. It will take continuous attention during each budget cycle, and special budget allocations, grants, and gifts to accomplish all ECPL goals.

FUNDING AND FINANCE STRATEGIC PRIORITY DIRECTION STATEMENT

The Erie County Public Library stakeholders, through the Strategic Planning Committee, will ensure that adequate funding and finance are available to support library infrastructure and delivery of library services.

Goal 1. The Erie County Public Library stakeholders, through the Strategic Planning Committee, will work with the County Council and Administration to acquire maximum financial support for the operational budget and delivery of library services, maintenance, capital improvements, and establishment of library infrastructure.

Action Plans

1. The ECPL Director, with staff support, will prepare and present an annual budget cycle request to the County Government that has been reviewed and endorsed by the Strategic Planning Committee.
Completion Deadline: July 31 annually
Responsible Person: Library Director
2. The ECPL Director will advise the Strategic Planning Committee of the impact of the annual County Government budget allocation. The report will include library service and infrastructure changes that will be implemented, or revised, in response to the budget allocation.
Completion Deadline: December 15 annually
Responsible Person: Library Director

Goal 2. The Erie County Public Library stakeholders, through the Strategic Planning Committee, will seek additional revenue sources to supplement the budget beyond base funding to meet the full range of library service needs.

Action Plans

1. The Erie County Public Library Foundation Board, and the Library Director and Strategic Planning Committee, will develop a plan to withdraw and use part of the Blasco Endowment for the construction of branch libraries.
Completion Deadline: January 2006
Responsibility: Chair, Library Foundation

2. The Erie County Public Library Foundation Board will develop a fund-raising campaign to seek community support and increase the endowment.
Completion Deadline: January 2006
Responsibility: Chair, Library Foundation

3. The Erie County Public Library Strategic Planning Committee will work with County Government to expand a grant-writing campaign to seek grant funds from private and public (local, state, and federal) agencies and foundations.
Completion Deadline: Ongoing
Responsible Person: Library Director

Goal 3. The ECPL stakeholders will review and ensure that delivery of Library services is done in the most effective manner.

Action Plan

1. The Director of ECPL will submit an annual budget report to the Strategic Planning Committee that summarizes budget allocations and expenditures for library services and infrastructure development and maintenance. The Strategic Planning Committee will make recommendations for future budget allocation expenditures to support the current Strategic Plan.
Completion Deadline: August 1 annually
Responsible Person: Library Director, Director of Facilities

Goal 4. The ECPL Strategic Planning Committee stakeholders will review and promote the financial investment in Library services and advance the Library's benefits to the community.

Action Plan

1. After each annual review of the Director's budget allocation and expenditure report, the Strategic Planning Committee will prepare and release to the media and County Government a news release announcing and describing the public benefits made available through ECPL services.
Completion Deadline: January 30 annually
Responsible Person: County Clerk

STRATEGIC PRIORITY 4.COMMUNITY RELATIONS AND MARKETING

Introduction

Strategic Priority issues and directions were identified based on information and ideas from the various strategic planning exercises and activities, e.g., review of earlier reports, community scan, emerging trends in public libraries, and the SWOT analysis of the library's internal strengths and weaknesses and external opportunities and threats.

The Strategic Priority directions, and their related goals and action plans, developed for the Strategic Plan are proposed steps to move the Erie County Public Library closer to achieving the ideal Vision for the Future identified by the Strategic Planning Committee. The goals and action plans serve as benchmarks that the Library staff members, and related stakeholders, seek to achieve to implement the strategies contained in this document.

The purpose of the *Community Relations and Marketing Strategic Priority Direction Plan* is to develop methods to communicate and market the benefits of the Library's services and programs, and provide additional channels to receive citizen feedback, so that they can be better served, be better informed of the Library's value, and take advantage of all that the ECPL provides.

The ECPL stakeholders on the Strategic Planning Committee have a strong commitment to enhancing and improving the current community relations and marketing practices used by the ECPL. The ECPL Strategic Planning Committee stakeholders will creatively review current community relations and marketing practices and identify new ways to effectively communicate and market the benefits of the ECPL to the citizens it serves. The ECPL stakeholders will also monitor the community's use of services and report the Library's benefits to the community.

Evaluation and Continuous Strategic Planning

Community Relations and Marketing will be a priority issue for continuous review and action by the ECPL Strategic Planning Committee stakeholders. The ultimate goal is to ensure that the Erie County Public Library and branches effectively serve the maximum number of citizens possible. The Strategic Priority Plan will be reviewed continuously and revised annually, as goals and action plans are accomplished and new goals and action plans are identified and established. An inclusive participatory process with the ECPL stakeholders, the Strategic Planning Committee, will be utilized to undertake an annual review and revision of the existing Community Relations and Marketing Strategic Priority Direction Plan. Based upon input by all relevant parties, a detailed revision of this document will be developed and implemented.

Completion of the goals and action plans and items listed in the plan and timeline portion of this document will serve as a measurement of success. Measuring ongoing and developing strategies will be harder, but feedback from patrons and staff in the form of surveys, anecdotal information, and staff observations will help determine the impact of

the unfolding direction. The community relations and marketing efforts outlined in this plan will be pursued to increase patron satisfaction.

The ECPL will pursue a continuous strategic planning process. The Strategic Planning Committee will continue to work to develop an understanding of future community relations and marketing needs of the ECPL and to refine this plan to meet those needs. In order to accomplish all goals in the Strategic Plan, the Committee recognizes that additional, special, funding may be needed.

COMMUNITY RELATIONS & MARKETING STRATEGIC PRIORITY DIRECTION

The Erie County Public Library stakeholders, through the Strategic Planning Committee, will develop and use the most effective and efficient means to build community relations and market its materials, services and programs to the citizens it serves. The Library will strengthen two-way communication with citizens in order to address the needs and concerns of individuals who are infrequent or non-library users and to gather more specific information from regular library patrons in order to stay abreast of their needs.

The ECPL will reach our community through focused marketing and promotion to increase the community's perception of the library's value and relevance. The ECPL will develop more community advocates and deeper and wider political support for the library. The ECPL stakeholders will improve community understanding of library collections, programs, and services and how they enhance their lives.

Goal 1. The ECPL will maintain current and establish new collaborative partnerships with the public and private sectors, including individuals, organizations, government, and businesses.

Action Plans

1. Inventory and evaluate existing partnerships.
Completion date: September annually
Responsible person: Main Library Coordinator
2. Identify new partnerships to further the mission of the library.
Completion date: Ongoing
Responsible person: Strategic Planning Committee
3. Develop a strategy for establishing new partnerships.
Completion date: Ongoing
Responsible person: Strategic Planning Committee
4. Partner with other County departments/divisions for public relations and community activities.
Completion date: Ongoing

Responsible person: Library Director

5. Schedule ECPL staff time to build community partnerships.

Completion date: Ongoing

Responsible person: Library Director

6. Formalize, strengthen and maintain existing productive partnerships.

Completion date: Ongoing

Responsible person: Library Director

Goal 2. The ECPL will build a stronger positive community image for library services.

Action Plans

1. Design a library PowerPoint presentation and communication plan incorporating various media to present to area businesses, neighborhood associations, organizations, and citizens.

Completion date: Ongoing

Responsible person: Library Director

2. Continuously analyze community populations (users, non-users, and under-served) to determine where the library needs to concentrate marketing.

Completion date: Ongoing

Responsible person: Library Director

3. Establish a Speaker's Bureau of library supporters, including Library Board and Foundation Board members, as spokespersons for library services.

Completion date: Ongoing

Responsible person: Library Director

4. Establish a committee of volunteer public relations professionals to work in concert with the Foundation and other Library stakeholders.

Completion date: December

Responsible person: Library Director, Media Liaison

5. Actively develop public relations to increase public awareness of the Library through participation in the community, media releases, displays, and events.
Completion date: Ongoing
Responsible person: Media Liaison

6. Market Library and information services as a gateway to lifelong learning in traditional and virtual environments.
Completion date: Ongoing
Responsible person: Library Director

7. Develop regular local media news spots.
Completion date: Ongoing
Responsible person: Library Director

8. Develop a plan to establish exterior signage, including billboards and permanent signs, throughout the County.
Completion date: November, 2005
Responsible person: Erie COG

9. Develop Web pages, including a Portal, for targeted audiences, such as seniors and teens.
Completion date: June, 2006
Responsible person: Main Library Coordinator

STRATEGIC PRIORITY 5. HUMAN RESOURCES AND MANAGEMENT

Introduction

Strategic Priority issues and directions were identified based on information and ideas from the various strategic planning exercises and activities, e.g., review of earlier reports, community scan, emerging trends in public libraries, and the SWOT analysis of the library's internal strengths and weaknesses and external opportunities and threats.

The Strategic Priority directions, and their related goals and action plans, are proposed steps to move the Erie County Public Library closer to achieving the ideal Vision for the Future identified by the Strategic Planning Committee. The goals and action plans serve as benchmarks that Library staff members, and related stakeholders, seek to achieve to implement the strategic priorities contained in this document.

The purpose of the *Human Resources and Management Strategic Priority* direction plan is to ensure that the ECPL and its branches are adequately staffed and that staff are qualified with the technical, management, and communication skills needed in today's complex library service system. The purpose of the *Human Resources and Management Strategic Priority* direction plan is also to ensure that management continually anticipates and responds to the changing social, economic, and organizational environment for library services. This will include enhanced planning and evaluation skills and procedures.

The ECPL stakeholders on the Strategic Planning Committee have a strong commitment to enhancing and improving the human resources and management practices used by the ECPL. The ECPL Strategic Planning Committee stakeholders will review current human resources and management practices and identify new ways to improve upon them.

Evaluation and Continuous Strategic Planning

Human Resources and Management is a priority issue for continuous review and action by the ECPL Strategic Planning Committee stakeholders. The ultimate goal is to ensure that the Erie County Public Library and branches effectively and efficiently serve the maximum number of citizens possible. This Strategic Priority plan will be reviewed continuously, and revised annually, as goals and action plans are accomplished and new goals and action plans are identified and established. An inclusive participatory process with the ECPL stakeholders, the Strategic Planning Committee, will be utilized to undertake an annual review and revision of the existing Human Resources and Management Strategic Priority direction plan. Based upon input by all relevant parties, a detailed revision of this document will be developed and implemented.

Completion of the goals and action plans and items listed in the plan and timeline portion of this document will serve as a measurement of success. Measuring ongoing and developing strategies will be harder, but feedback from patrons and staff in the form of surveys, anecdotal information, and staff observations will help determine the impact of the unfolding direction. The human resources and management efforts outlined in this plan will be pursued to increase patron satisfaction.

The ECPL will pursue a continuous strategic planning process. The Strategic Planning Committee will continue to work to develop an understanding of Human Resources and Management needs of the ECPL and to refine this plan to meet those needs. In order to accomplish all goals in the Strategic Plan, the Committee recognizes that additional, special, funding may be needed.

HUMAN RELATIONS AND MANAGEMENT STRATEGIC PRIORITY DIRECTION PLAN

The Erie County Public Library stakeholders, through the Strategic Planning Committee, will ensure that there is an adequate size, and qualified staff at the ECPL and its branches. The Strategic Planning Committee will also work with the Library Director and ECPL staff to ensure that management continually anticipates and responds to the changing social, economic, and organizational environment for library services.

Goal 1. The ECPL Director will ensure that Library staff is appropriately qualified to deliver required, quality, library services.

Action Plans: Human Resources

1. Evaluate and inventory existing skill levels of staff and prepare a training and skill development program.
Completion deadline: Upon Hire/Ongoing
Responsible person: Library Director
2. Continue developing cooperative training sessions with other County departments.
Completion deadline: Ongoing
Responsible person: Library Director
3. Identify training courses available from other sources, e.g., colleges, technical institutes, consultants, etc.
Completion deadline: Ongoing
Responsible person: District Library Consultant
4. Continue to evaluate the effectiveness of staff training and regularly monitor staff skills.
Completion deadline: Ongoing
Responsible person: Library Director , District Consultant

Goal 2. The Erie County Public Library Director will ensure that staff are deployed in the most efficient and effective manner.

Action Plans: Human Resources

1. Review current staffing patterns and evaluate workload and required levels of service.
Completion deadline: Ongoing
Responsible person: Library Director
2. Identify new staff deployment needs and procedures.
Completion deadline: Ongoing
Responsible person: Library Director

Goal 3. The Erie County Public Library Director will ensure that Library services are evaluated on a regular basis and updated procedures are in place to manage service delivery.

Actions Plans: Management

1. Develop benchmark standards against which to evaluate Library services.
Completion deadline: June 2006
Responsible person: Library Director, Main Library Coordinator
2. Survey library users and non-users to investigate and determine their satisfaction and additional service requirements.
Completion deadline: Ongoing
Responsible person: Library Director, Main Library Coordinator
3. Develop performance standards to be used on an annual basis to monitor and evaluate Library service in Erie County.
Completion deadline: June 2006
Responsible person: Library Director, Main Library Coordinatr

Goal 4. Pursue the development of closer partnerships and improved services in the collective bargaining process through monthly labor/management meetings.

Action Plans: Management

1. Identify ongoing concerns in the collective bargaining contract that impact management leadership decision-making.
Completion deadline: June 2006
Responsible person: Library Management
2. Identify the improved and strengthened areas resulting from the collective bargaining relationship.
Completion deadline: June 2006
Responsible person: Library Management

STRATEGIC PRIORITY 6. LIBRARY SERVICES AND COLLECTIONS

Introduction

Strategic Priority issues and directions were identified based on information and ideas from the various strategic planning exercises and activities, e.g., review of earlier reports, community scan, emerging trends in public libraries, and the SWOT analysis of the library's internal strengths and weaknesses and external opportunities and threats.

The Strategic Priority directions, and their related goals and action plans, are proposed steps to move the Erie County Public Library closer to achieving the ideal Vision for the Future identified by the Strategic Planning Committee. The goals and action plans serve as benchmarks that library staff members, and related stakeholders, seek to achieve to implement the strategic priorities contained in this document.

The purpose of the *Library Services and Collections Strategic Priority Direction Plan* is to ensure that the ECPL is a community library serving the general interests and specialized needs of users and underserved populations, accessing national and regional collections, enhancing the interlibrary loan system, and expanding more on-line reference materials.

The purpose of the *Library Services and Collections Strategic Priority Direction Plan* is also to ensure that the ECPL makes the best decisions about a collection of books, magazines, audio/visual, and electronic materials based on the County's diverse population.

The ECPL stakeholders on the Strategic Planning Committee have a strong commitment to enhancing and improving the service and collection practices used by the ECPL. The ECPL Strategic Planning Committee stakeholders will review current services and collection practices and help identify new ways to improve upon them.

Evaluation and Continuous Strategic Planning

The Library Services and Collections direction is a priority issue for continuous review and action by the ECPL Strategic Planning Committee stakeholders. The ultimate goal is to ensure that the Erie County Public Library and branches effectively and efficiently serve the maximum number of citizens possible. This Strategic Priority plan will be reviewed continuously, and revised annually, as goals and action plans are accomplished and new goals and action plans are identified and established. An inclusive participatory process with the ECPL stakeholders, the Strategic Planning Committee, will be utilized to undertake an annual review and revision of the existing Library Services and Collections Strategic Priority direction plan. Based upon input by all relevant parties, a detailed revision of this document will be developed and implemented.

Completion of the goals and action plans and items listed in the plan and timeline portion of this document will serve as a measurement of success. Measuring ongoing and developing strategies will be harder, but feedback from patrons and staff in the form of surveys, anecdotal information, and staff observations will help determine the impact of

the unfolding direction. The Library services and collections efforts outlined in this plan will be pursued to increase patron satisfaction.

The ECPL will pursue a continuous strategic planning process. The Strategic Planning Committee will continue to work to develop an understanding of Library services and collections needs of the ECPL and to refine this plan to meet those needs. In order to accomplish all goals in the Strategic Plan, the Committee recognizes that additional, special, funding may be needed.

SERVICES AND COLLECTIONS STRATEGIC PRIORITY DIRECTION PLAN

The Erie County Public Library stakeholders, through the Strategic Planning Committee, will ensure that the Library provides services to support its mission and enhance the quality of life of County citizens. The Library will continue to manage a collection of books, magazines, audio/visual, and electronic materials based on the needs of Erie County's increasingly diverse population.

Goal 1. The Erie County Public Library Director will ensure that the Library will enhance collections and materials through coordinated collection development.

Action Plans: Excellent Collections

1. Review the collection selection process, making more effective use of online selection tools while maintaining quality materials review.
Completion deadline: Ongoing
Responsible person: Library Director, Professional Librarians
2. Review the systematic approach to coordinated collection management, which provides for regular evaluation of usefulness, currency, and cultural value.
Completion deadline: January
Responsible person: Library Administration
3. Devote no less than 12 percent of the Library's total fiscal year budget to books and non-print materials.
Completion deadline: July 5
Responsible person: Library Director, County Administration

Goal 2. Continue to develop a collection with an effective balance between electronic resources and traditional print/non-print materials.

Action Plans: Excellent Collections

1. Establish a range of electronic resources to provide equity of service and information access countywide, and enhance the Library's collections.
Completion deadline: Ongoing
Responsible person: Blasco Library Coordinator

2. Provide and maintain strong print collections countywide, which meet the educational, entertainment, enrichment, and informational needs of the community.
Completion deadline: Ongoing
Responsible person: Blasco Library Coordinator
3. Coordinate reference collections throughout the system, recognizing the need to adapt to local circumstances.
Completion deadline: Ongoing
Responsible person: Blasco Library, Branch Library Coordinators

Goal 3. Maintain our excellent services and enhance our countywide services to meet the needs in the following areas: children, teens, seniors, ethnic groups, and literacy programs.

Action Plans: Excellent Service

1. Evaluate the current level of service to children and teens, and propose a plan of service utilizing input, including monitoring programming, circulation, and attendance from teens, teachers, parents, community youth advocates, and the Library's coordinators for adult and children's services.
Completion deadline: Ongoing
Responsible person: Library Administration
2. Evaluate services extended to seniors, and propose a plan of service using input from seniors and senior service agencies.
Completion deadline: Ongoing
Responsible person: Library Administration
3. Evaluate services extended to ethnic communities. Determine needs from ethnic community service providers and develop a plan for library services.
Completion deadline: Ongoing
Responsible person: Library Administration

Appendix A.

ERIE COUNTY PUBLIC LIBRARY STRATEGIC PLANNING COMMITTEE

RESEARCH & BACKGROUND READING LIST*

Erie County Public Library Policy Manual Sections, May 27, 2005

ECONOMIC RESEARCH INSTITUTE OF ERIE NEWSLETTER, May 20, 2005

Erie County Public Library Strategic Planning Meeting (pre-consultant) Minutes March 24, 2005.

Erie County Public Library Branch Building Timeline Minutes (for discussion only).
March 11, 2005

American Library Association. www.ala.org
<http://www.ala.org/ala/oif/statementspols/corevaluesstatement/corevalues.htm> 2005

Public Library Subsidy Timeline. February 16, 2005

Report to the Erie County Public Library Foundation: Enhancing and Expanding the
Delivery of Library Services to Erie County. By C.S. Alloway and R. Browa, Library
Consultants. November 20, 2004

Erie County Public Library: 2004 Pennsylvania Public Library Survey

ERIE COUNTY PUBLIC LIBRARY SERVICES: ANALYSIS AND PLAN
A study Prepared to Assist in the Implementation of the Erie County Community Facilities
Plan 1998

State Aid 101. The 18th Annual Pennsylvania Public Library Trustee Institute. April, 2004

Erie County Demographic Study. Prepared by Graney, Grossman, Colosimo and
Associates, Inc. January, 2003

Back to Prosperity: A Competitive Agenda for Renewing Pennsylvania. A Profile for the
Erie Area. Prepared by The Brookings Institution Center on Urban and Metropolitan
Policy. circa 2002

Public Library Service in Pennsylvania: Then and Now. By the Pennsylvania Library
Association. May 2, 2003

Comprehensive Annual Financial Report for the Year Ending December 31, 2003. County Erie Pennsylvania, Erie County Finance Department. Page 71, Library Special Revenue Fund

Erie County Public Library: Thomas J. Hennen, Jr. index report. 2003

Pennsylvania Library Laws. 2001. Update to Library Laws. January 8, 2003

The Planning for Results Workforms. American Library Association, 2001.

Planning For Results: A Public Library Transformation Process. E. Himmel and W. J. Wilson. American Library Association, 1998.

* Indicates numerous reviews of public and private library and other organizations' strategic plans, and other related sites, that were Googled on the Internet and referred to and used in various ways.