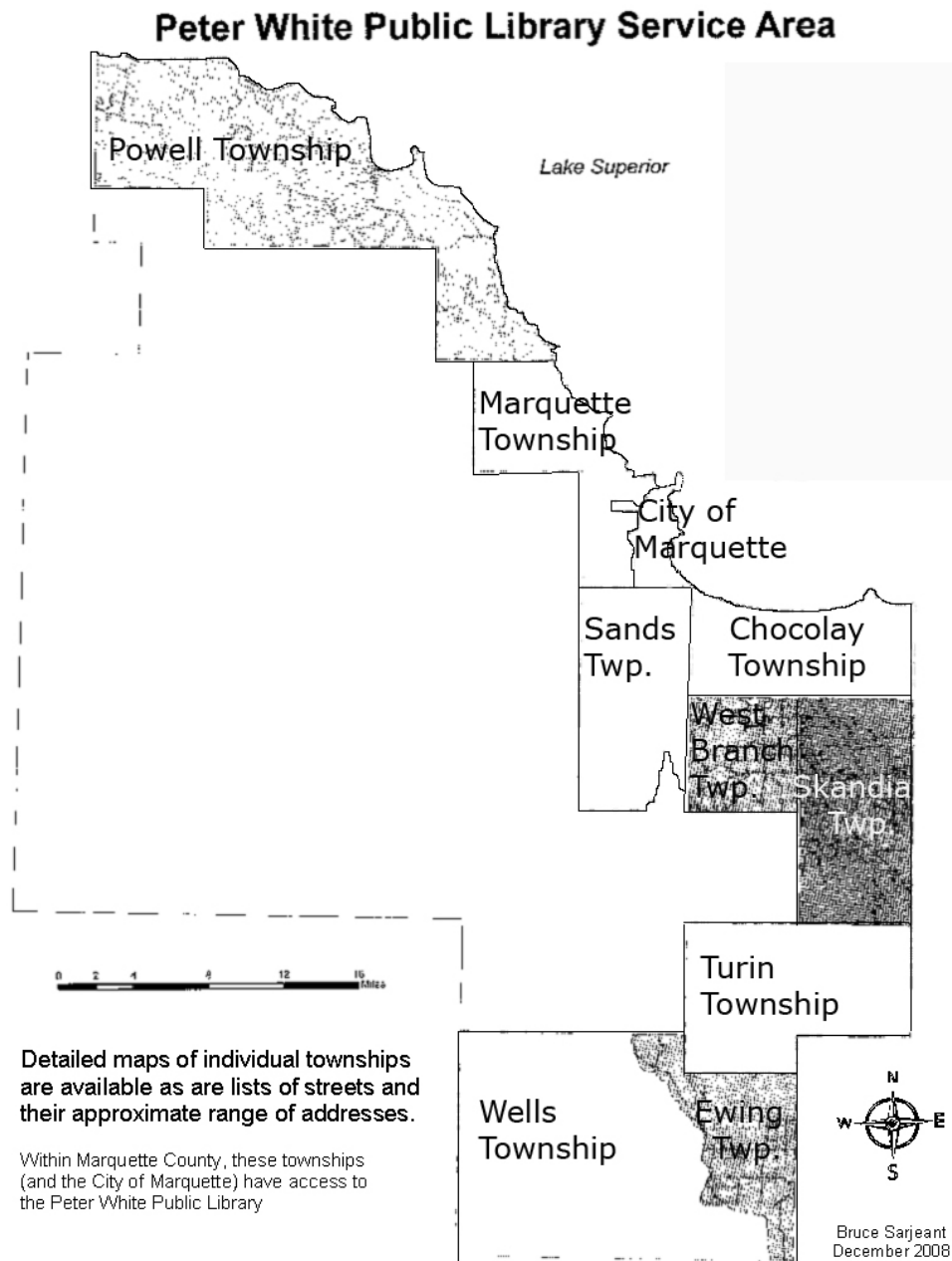


Peter White Public Library

Charting A Course for the Future--Introduction

The Peter White Public Library was established in 1891 by Public Act 254 of 1891. This Act was amended by Public Act 7 of 1929. This legislation establishes a voter-approved millage in perpetuity for the support of the PWPL.

The Peter White Public Library is the largest public library in Michigan's Upper Peninsula. The Library serves residents of the City of Marquette and the following townships—Charter Township of Chocolay, Marquette Charter Township, Sands Township, Skandia Township, West Branch Township, Powell Township, Ewing Township, Turin Township and Wells Township. The service population of the PWPL is 35,421 people. This is 55% of the population of Marquette County.



In order to set a course for the future, the Peter White Public Library (PWPL) embarked upon a strategic planning process with the assistance of Mary Cary Crawford, Library Consultant, in October

2005. This year-long process involved Library users, staff members, Board of Trustees members and teens in a series of focus groups held at the Library and facilitated by Crawford. 134 people participated in this process. Names of the participants are listed in Appendix A.

Peter White Public library

Charting a Course for the Future--Values Discussion

Crawford led the planning by asking the participants to identify the values that should be embraced by a public library. These characteristics did not necessarily have to be found at the PWPL.

- Overwhelmingly, the participants identified an institution that encourages, supports and defends intellectual freedom. The institution should also provide programs and services that challenge its users to expand their knowledge.
- The staff and administration of the library, including its Board, should be knowledgeable, competent and friendly.
- Library collections need to be diverse, support formal and informal learning, and meet community needs.
- A library should be a community center for cultural and social programs that further enrich the community.
- The Library facility needs to accommodate its users by providing adequate lighting, seating and parking. It should be an attractive facility that draws people in. It should accommodate those with disabilities.
- A library should be a safe place—safe for the exploration of ideas as well as being a place where people are physically safe and secure.
- Funding for a public library should be stable, as well as diverse, with public and private support.

Peter White Public Library

Charting a Course for the Future—Vision Discussion

The groups then discussed their vision for the PWPL. These sessions identified programs, services, facilities, staffing and administrative issues the groups would like to have developed or improved at the PWPL. Common themes were

Services

- Collections
- Programming
- Hours of Operation
- Technology

Community Relations

- Outreach
- Friends of the Peter White Public Library
- Public Relations
- Partnerships and Collaborations

Administrative Matters

- Personnel
- Facility
- Financing and Budget

Crawford collected the Vision ideas and asked each participant to vote for his/her favorite ideas. The top ten ideas were then identified in each group.

Members of the focus groups were then asked to rate the priority of each of the ten goals. Based on the responses for the top three items the goals were ranked in the following order (from highest support to lowest support).

1. Strengthen PWPL funding
- 2.. Establish a Friends of the Peter White Public Library group
- 3.. Hire a Deputy Director
4. Designate 15% of the annual operating budget for materials
5. Conduct a space utilization study
- 6.. Hire a full-time Marketing/Programming Coordinator
- 7.. Designate an established percentage for technology and technology enhancements
8. Improve the PWPL website
9. Library open seven days per week year around
10. Increase the number of MLS degreed staff

Peter White Public Library

Charting A Course for the Future—PWPL Strategic Planning Committee

The PWPL Strategic Planning Committee, comprised of Board of Trustees Robert Glenn and Dianne Patrick as well as staff members Cathy Sullivan-Seblonka, Youth Services Librarian and Library Director Pam Christensen met with Crawford in the spring of 2006 to review the results of the strategic planning focus groups and identify a plan of action.

The Strategic Planning Committee has prepared this document for approval by the Board of Trustees of the Peter White Public Library. Once the Board of Trustees have approved the document, it will be shared with the community at large via City Commission and Township Board meetings, the PWPL Website, Friends of the Peter White Public Library and other interested organizations.

The Committee reviewed the PWPL Mission Statement and discussed alternatives

Peter White Public Library

Charting a Course for the Future--Library Mission Statement Discussion

Current Peter White Public Library Mission Statement

The mission of the Peter White Public Library is to make informational, educational, cultural and recreational materials and programs available and accessible to all Library users. The staff will provide prompt, accurate information and guidance to our patrons in a welcoming and business-like atmosphere.

Alternative Peter White Public Library Mission Statement

The mission of the Peter White Public Library is to provide our community with materials, services and programs that promote life-long learning, freedom of expression, intellectual growth, recreational enjoyment and cultural awareness.

The Mission Statement will be reviewed at a later date.

Library Goals and Objectives as Identified by Strategic Planning Focus Groups

Strengthen and diversify Library funding and financial support

- Achieve an annual operating budget of \$2,000,000. (Current operating budget is \$1.4 million)
- Develop a plan to grow the PWPL Development Fund at the Marquette Community Foundation to \$1,000,000. (Fund is currently valued at \$86,540.35).
- Develop a donor recognition mechanism for Development Fund contributions.
- Develop a plan to grow Carroll Paul Memorial Trust Fund to \$1,000,000. (Current market value is \$802,862)
- Develop a comprehensive fund raising plan for the PWPL
- Appoint a PWPL Development Committee to assist with fund raising activities
- Educate Library Board and staff members of the importance of financially supporting the PWPL.
- Establish a goal of 100% participation for Board and staff members to contribute once per year to the PWPL.

Improve library advocacy on State, County, Township and City levels

- Establish a Friends of the Peter White Public Library organization
- Develop the knowledge and support of Township Advisory Council members
- Keep Board of Trustees, Township Advisory Council members and staff aware of issues affecting Library funding.
- Develop a comprehensive Communications Plan to address advertising, publicity, etc.
- Encourage Board members and staff members to take advantage of conferences, workshops and skill development opportunities related to Library administration, operations, advocacy, law, etc.

Provide the Marquette community with knowledgeable, skilled and enthusiastic staff

- Recruit, train and retain qualified staff members
- Increase the number of MLS-degreed staff
- Encourage PWPL staff to actively participate in local, regional, state and national professional organizations.
- Provide adequate budget to allow staff members, at all levels, to participate in professional development activities.
- Hold at least one all-staff in-service per year.

Operate the PWPL facility so that it is a clean, safe and welcoming environment for people of all ages and abilities

- Operate the PWPL seven days per week all year long (currently just September-May)
- Provide adequate staff, equipment and supplies to maintain the facility
- Improve the HVAC system and explore alternative energy sources to lower operational costs
- Conduct space utilization study to address concerns related to teen area, café, storage space and parking.

Assure adequate funding for staff, materials, programming, equipment and service to meet the needs of the community

- Designate a minimum % of expenditures for library materials and technology.
- Establish mechanisms to collect and evaluate patron satisfaction with staff, materials, programs, equipment and services to assure that the Library is meeting community needs.

- Develop partnerships with individuals, businesses, organizations and agencies to develop special collection and augment Library funding for materials.

Programming, Outreach, Collaboration and Partnerships

- Partner with the City of Marquette to ensure continuation of the Marquette Arts and Culture Center
- Create a Deputy Director position to enhance partnerships, outreach, collaboration, marketing and fund raising.
- Enhance the PWPL website

Peter White Public Library Goals and Objectives Response

Strengthen and diversify library funding and financial support

The current PWPL budget stands at \$1,320,275 for July 1, 2005-June 30, 2006. The anticipated budget for July 1, 2006-June 30, 2007 is \$1,400,000. This is an increase of approximately 6%. The majority of PWPL funding comes from income and property taxes collected in the City of Marquette and the five surrounding townships. This income has been growing at a 3-4% level each year.

Without significant sources of new or additional revenues, the Library will not attain a budget of \$2,000,000 for at least 10 years. The Board of Trustees and staff will have to develop a comprehensive plan for fund raising and identify new funding opportunities, if this goal is to be attained.

There was some support by strategic planning focus groups for investigating the advantages and disadvantages of changing the Peter White Public Library to a district library. This would mean that the PWPL would have to give up its status as a Legislatively established library with a dedicated operating millage from the City of Marquette. This change would mean a number of critical changes to the operations and governance of the PWPL. A broad-based committee should be named to explore the future options for the PWPL.

The PWPL Development Fund at the Marquette Community Foundation is currently valued at \$64,547. Growth to \$1,000,000 seems ambitious, but support of this fund continues to grow as its existence becomes more known. A select committee has agreed to conduct face-to-face solicitations of potential donors to the Development Fund in a quiet campaign to build this endowment.

The Carroll Paul Memorial Trust Fund has been in existence since 1969. The market value of this fund is currently \$802,862. The Board of Trustees has been spending this fund at a level of approximately 4% of growth and income. It seems realistic that the value of this fund will reach \$1,000,000 in the next five years. It has been suggested that fund raising be conducted to build the value of the fund or that expenditures be limited until the \$1,000,000 mark is reached. The Carroll Paul Memorial Trust provides approximately \$28,000 in revenues for the PWPL each year. If expenditures are limited, the Board of Trustees and/or staff should identify new funds that could be used to replace the CPMTF income.

Improve Library advocacy on State, County, Township and City Levels

Founding a Friends of the Peter White Public Library would be beneficial to the Library as well as citizens who would like a more active voice in supporting the Library. Friends groups are comprised of volunteers who can provide advocacy, fund raising, volunteer, programming, and publicity support.

To date, the biggest drawback to forming a Friends of the Library has been a lack of people willing to assume leadership positions within such a group. If a dedicated core of volunteers could be identified to form the Executive Board of the Friends of the Library, this group would be well on its way to creating a positive impact for the PWPL.

Cost of Friends of the Library establishment is estimated to be approximately \$5,000 for 501 (c) 3 application preparation and staff support.

The Library needs to continue to develop the knowledge and support of our Township Advisory Council as well as township residents from Chocoday, Marquette, Sands, Skandia and West Branch Townships. Township millage now comprises approximately 24% of the Library's revenues (\$313,000). Continuation of this funding is critical for the Library to maintain current programs and services.

The Library staff should also keep the Board of Trustees and Township Advisory Council members aware of issues affecting Library funding on local, state and national levels. This can be done by administrative staff at no extra cost.

Provide the Marquette community with knowledgeable, skilled and enthusiastic staff

Funding should be provided for staff development at all levels of the Library. This funding is an investment in the current staff. It makes staff feel valued if they are encouraged to develop their existing skills as well as learn new things. Staff members should be encouraged to participate in professional development opportunities as well as serve as presenters at local, regional, state and national conferences. The Library should continue the one time per year All-Staff In-Service training that has been done for the past 4 years. Cost of this event is approximately \$2,000. The budget for professional memberships, conferences and transportation should be maintained and increased as funds allow.

Staff wages and benefits are critical in retaining and recruiting qualified staff members, especially those with Masters degrees in Library and Information Science. The Library has labor agreements with AFSCME in effect until June 30, 2008.

The PWPL staff and community would benefit from additional staff members who have received a Masters degree in Library and Information Science. Additional MSL level staff for collection development and reference services would enhance the Library's ability to provide quality service to the community. The cost of one MLS staff member is approximately \$49,362.534 per year with wages and benefits).

Operate the Library facility so that it is a clean, safe and welcoming environment for people of all ages and abilities.

Operating the Library seven days per week twelve months out of the year, rather than the current 9 months, would cost approximately \$35,496.24 in fees related to staffing, maintenance and utilities. These costs may be off-set to some degree by additional revenues gained from rental fees, services, late fines, etc.

Provide adequate staff, equipment and supplies to maintain the facility. There is no doubt that the PWPL is maintained in a quality fashion. Adequate funds for staffing at current levels and maintenance supplies should be maintained. Staff should continually look at new equipment and supplies that could make maintenance services more cost-effective and efficient.

Improve the HVAC system and explore alternative energy sources to lower operational costs. The PWPL plans to request proposals for an energy audit to be conducted in June 2006. We hope that this audit will assist the Maintenance Services staff in improving HVAC system performance and reduce operational costs.

The 2006/2007 utilities budget for PWPL is \$108,100. The materials budget is \$154,300. The Library spends almost as much on utilities as it does on materials. If the Library is able to cut the expenditures for utilities, these funds could be used for improving other areas of service.

Alternative energy sources will also be addressed by the energy audit. Plans are underway to apply for a State of Michigan grant to install alternative energy systems at PWPL in 2007/2008 to reduce our dependence on natural gas and electricity. Energy audit cost is anticipated to be \$6,000. Alternative energy matching funds for the grant are anticipated to be \$10,000.

Conduct space utilization study to address concerns related to teen area, café, storage space and parking. Some space utilization studies can be conducted by existing PWPL staff. Space utilization studies are anticipated to cost \$10,000 to \$15,000.

Assure adequate funding for staff, materials, programs, equipment and service to meet the needs of the community.

Designate a minimum % for library materials and technology expenditures. Rule of thumb for libraries is to spend 15% of the operating budget on materials (books, magazines, AV, etc.) The PWPL is currently spending about 10%. Our materials budget for 2005/2006 is \$134,750 or 10.2%. The 2006/2007 materials budget is \$154,300 or 11%. To meet the 15% goal, we would need to spend \$210,000 on materials. This would require additional revenues of \$55,700.

Library staff has been unable to identify a rule of thumb for technology expenditures. Staff should study upcoming needs for technology improvements needed in the next 3 to 5 years and identify the percentage of expenditures that such upgrades would require. This in addition to current expenditures could be used to identify a realistic goal for technology spending.

Establish mechanisms to collect and evaluate patron satisfaction with staff, materials, programs, equipment and services to assure that the Library is meeting community needs. This should be an annual goal. Prior to the strategic planning sessions, the PWPL used an on-line survey to get responses from our customers. This was a cost effective method of securing data, but the response was low—approximately 100. Paper surveys were also available, and they netted a response of approximately 30. Publicity regarding the surveys or having staff or volunteers ask Library visitors to complete a survey might be more effective in gaining an expanded number of surveys in return. Cost estimate to conduct an annual survey is estimated to be approximately \$500 per year.

Develop partnerships with individuals, businesses, organizations and agencies to develop special collections and augment Library funding for materials. This is a realistic way to get support for the development of collections related to a specific theme or subject. We have worked with other organizations to place special collections at the PWPL. This is an area where the Deputy Director or Friends of the Peter White Public Library might play a vital role.

Programming, Outreach, Collaboration and Partnerships

Partner with the City of Marquette to ensure the continuation of the Marquette Arts and Culture Center. The Library Board of Trustees and Library Director have shared their concerns about continued operation of the MACC with the City Manager and City Commission.

Create Deputy Director position to enhance partnerships, outreach, collaboration and fund raising. The Library Director has recommended reassigning an existing staff member to this position in order to address this goal. The Board of Trustees expects to raise \$76,350 in 2006/2007 to balance the budget. These funds would be the result of increased fund raising, grant writing, special events, etc. The Deputy Director would be responsible for raising these funds. Cost of the Deputy Director is anticipated to be \$56,700.

Another position identified during the strategic planning process was the need for a full-time Marketing/Programming Coordinator for the PWPL. The Library currently has one person working part-time in this position. The estimated cost of a full-time position, not including the cost of current staff member, is \$30,389.58. This might be a staff member that could be shared with the Marquette Arts and Culture Center.

Enhance the Library's website. The PWPL website is designed and updated by a PWPL staff member. While this staff member has done an excellent job with the resources allotted to this function, she is in need of updated software and training to keep the website up and running. Cost to improve the website is estimated at \$4,000 to \$8,000. This might be a function that could be contracted out to a professional website development and hosting firm, might be shared with the Marquette Arts and Culture Center or might be the responsibility of the Marketing/Programming Coordinator.

Conclusion

The Peter White Public Library has benefited greatly from the insights of the 134 people who took part in the strategic planning focus group sessions.