

Rachel Kohl Community Library Strategic Planning Documents

Final Draft, 10/10/19

This package contains the following documents related to the future direction of Rachel Kohl Community Library.

- **Mission and Vision Statements**
- **Values Statement**
- **2019-2023 Strategic Plan**
- **Tactical Plans for remainder of 2019-2020 Related to Each Goal Area**

Rachel Kohl Community Library Mission and Vision Statements

Mission (Our purpose for existing)

The Rachel Kohl Community Library improves the quality of life among area residents by providing the materials, tools, programming and facilities that create opportunities for life-long learning, enjoyment, and interaction among all generations.

Serving Bethel, Chadds Ford, Chester Heights, Concord and Thornbury, PA



Vision (Our dream for tomorrow)

The Rachel Kohl Community Library will become a highly utilized, sustainable “library of the future,” serving as the primary center in our five-municipality region for learning, information gathering, research and leisure activities.

<i>We will know we are capable of achieving our vision when:</i>		<i>Tier</i>
Our Board of Trustees, staff and volunteers have the capability to generate the resources needed for long-term growth and sustainability.		Top
The communities we serve recognize and appreciate the value we bring to our region’s collective quality of life.		Top
Our financial base is sufficiently broad and deep, enabling us to sustain and expand our programs to meet emerging needs.		Top
We have achieved increased and stable funding from our communities.		Top
We have three months or more of surplus funds to cover unforeseen expenses.		Mid
We have a growing ability to attract human and financial resources from people, institutions and businesses.		Mid
Our full-time staff is competitively compensated and receiving benefits in keeping with other similar libraries.		Mid
We are successful in adapting our collections to meet the evolving needs of our patrons.		Mid
Utilization is growing by 10% annually across all measured segments.		Low
Our technological infrastructure and capabilities are in keeping with our growth.		Low
<i>Key Areas of Strategic Focus:</i>		
Focus Board activity principally on those collective actions that lead to increased funding across all revenue segments. <i>(Governance)</i>		Top
Engage non-fiduciary Development Council in support of our development strategies. <i>(Sustainability)</i>		Top
Build our individual donor base. <i>(Fundraising)</i>		Top
Build community participation, engagement and presence. <i>(Marketing, PR)</i>		Top
Create strong relationships with community leadership and influential individuals in our service area. <i>(Strategic Relationships)</i>		Top

Rachel Kohl Community Library Values and Operating Principles Statement

VALUES AND OPERATING PRINCIPLES (As an Organization and as Individuals)	
We will be a highly valued regional resource for intergenerational learning, information, research and leisure activities...	
Through	By
Our Approach to Serving Our Communities and Our Focus	<ul style="list-style-type: none"> • Conducting our affairs in keeping with professionally accepted ALA principles of proper library management. • Focusing our mission on serving the educational, cultural, social and economic needs of five municipalities. • Maintaining reading, learning and leisure time activities as our principal areas of focus. • Pursuing only those activities that are aligned with our mission in support of education, business and recreation. • Providing a safe, welcoming, inclusive and harmonious environment that promotes acceptance of all.
Our Commitment to Meeting the Needs of Our Communities	<ul style="list-style-type: none"> • Treating every individual with dignity, compassion, respect and sensitivity. • Serving everyone regardless of gender, age, race, religion, sexual orientation or national origin. • Promoting a love for and appreciation of knowledge. • Helping patrons of all ages reach their potential. • Breaking down the barriers that inhibit individuals from learning and communicating.
Our Approach	<ul style="list-style-type: none"> • Stimulating creativity, intellectual curiosity, social interaction, language skills, community involvement and citizenship. • Facilitating lifelong learning across all ages across the communities we serve. • Excelling in: collecting, preserving, and providing easy access to educational and recreational resources. • Creating opportunities for collaboration, cooperation and mutual support among our staff, Board, volunteers and individuals and organizations that could benefit from our endeavors. • Creating a welcoming and comfortable physical environment. • Ensuring that every activity we undertake supports our mission, vision and values. • Providing library services and resources in multiple formats that meet our users' needs.
Our Stewardship of Resources	<ul style="list-style-type: none"> • Effectively and economically managing the resources entrusted to us. • Assuring that benefits of any activity we undertake are in keeping with the human and financial costs of delivery. • Seeking ways of leveraging every activity to support additional goals included in our plans. • Avoiding at all costs the practice of deficit budgeting. • Maintaining a strong, diverse and committed Board of Trustees who will ensure excellent financial controls and oversight. • Engaging community leadership at all levels as potential allies and supporters.
A Pursuit of Excellence in All We Do	<ul style="list-style-type: none"> • Maintaining a high level of professionalism in all tasks and relationships. • Constantly seeking to improve our skills, techniques, materials, offerings and approaches. • Leveraging the skills of staff, Board, and volunteers who have demonstrated success, maturity and leadership in the professions from which they are drawn.

Rachel Kohl Community Library Strategic Plan 2019-2023

Governance			
Principal Goal Areas	Long-Term Goals (Where we'd like to be in 3-5 years)	Annual Goals for 2019-2020 (Major targets for current year)	Strategies and Key Tactics (Best approaches for addressing barriers, opportunities.)
Board Development and Engagement	Maintain a governing Board composed of members who collectively bring to the table the ability to ensure the sustainability, utilization and impact of the organization.	<ul style="list-style-type: none"> ▪ Utilize our 12-member non-fiduciary Development Council more fully. ▪ Organize a working committee structure at the Board level <p style="color: red; margin-top: 10px;">TO DO: Ask Randy about the strategies, etc in next column and below</p>	<ul style="list-style-type: none"> ▪ Create a charter for the Development Council that utilizes members help to improve Library sustainability, high-level relationships and to bring needed connections and resources to the Library. ▪ Share minutes of the board meeting with Development Council members. ▪ Explore with the Development Council establishing an annual "Friend-raising" event. ▪ Engage the Development Council in identifying potential resources that would contribute materials etc. to the annual campaign. ▪ Create a standing Fundraising Committee to include at least 2 permanent Board members and three Development Council Members. ▪ Ensure that each Board member understands his/her role and responsibilities. ▪ The Board will continue to utilize our Development Council and populating it with individuals who have the capability to connect and advocate on our behalf with local municipal leadership and who bring needed skills to our table. ▪ The staff will provide the Board with more quantifiable information on programs (what's working, what is not and what we can change). ▪ Identify potential future Board members and invite them to participate on the Development Council in order to help ensure the future strength of the Board. ▪ Board members will become more visible at Library events. ▪ The board will consider creating the following committees: Fundraising, Planning, and Executive. ▪ Committees will be led by a board member and staffed with non-board volunteers and/or staff as appropriate.
Long-term Sustainability	<p>By YE 2020, expand the Development Council to 20 committed individuals.</p> <p>By YE 2019, have in place a fully functioning fundraising and financial development capability (supported by a standing Board fundraising committee).</p>	<ul style="list-style-type: none"> • By YE 2019, expand the Development Council to 16 committed individuals. ▪ Maintain our connection with EveryLibrary.org for pro-bono assistance in increasing levels of revenue support from all contributing segments including municipalities. 	<ul style="list-style-type: none"> ▪ Our financial priorities going forward will be employee compensation equity, continuity of our reserve policy and fund and facilities development. ▪ Each year raise sufficient funds on an annualized basis (above earned revenues) to provide the dollars needed to support the organization and to fund a growing reserve. ▪ Ensure that the Development Council is ethnically and racially diverse. ▪ Become more adept at utilizing Little Green Light as a donor development and segmentation program. ▪ Ensure that other libraries in our region are aware of the progress we are making. ▪ Identify and maintain contact with individuals who may be important to a future referendum. ▪ Improve our ability to generate news in area newspapers.

Finances, Revenue Generation and Fundraising

Principal Goal Areas	Long-Term Goals (Where we'd like to be in 3-5 years)	Annual Goals for 2019-2020 (Major targets for current year)	Strategies and Key Tactics (Best approaches for addressing barriers, opportunities.)
Financial Management, Transparency and Compliance	By YE 2020, we will have at least three months of operating expenses in reserve (up from the current 0 months).	<ul style="list-style-type: none"> ▪ Complete a 2020 operating budget by December 31, 2019. ▪ Add \$\$ to our reserve fund in 2019 (Amount TBD as part of the budgeting process). ▪ Publish the 2019 Annual Report on the web site ▪ Review and update the by-laws as necessary. ▪ 	<ul style="list-style-type: none"> ▪ The 2020 Budget will include a provision for expanding/growing reserves. ▪ Continue to adhere to our financial reserves policy. ▪ Our fiscal and financial management will be accurate and transparent at all times.
Governmental Revenues (State and Local)	Within five years the Library will be at a sustainable-funding level.	<ul style="list-style-type: none"> ▪ <i>(See Facilities and Infrastructure Section for Keystone Grant goals).</i> 	<ul style="list-style-type: none"> ▪ Seek dollar specific funding increases from each of the five communities we serve on an annualized basis, (particularly the municipalities that are in the lowest per-capita funding tiers). ▪ Establish funding targets for each municipality based on a per-capita percentage of population. ▪ Work with volunteer advisors on developing stronger contacts among municipal leaders. ▪ Host a donor event once a year for large donors. ▪ Host a Library Legislative engagement function.
Fundraising	<p>Within five years be at an annual funds raised level of \$55,000 net of expenses from our Annual Appeal Campaign.</p> <p>By YE 2020, launch a formal planned giving/bequests program that includes messages across all Library promotional mediums.</p>	<ul style="list-style-type: none"> ▪ Raise at least \$50,000 net from our annual fund drive. ▪ Raise the number of individual donors from the current 563 active donors now to 600 and the total average gift from \$105 to \$120, a 15% increase. ▪ Expand our donor prospect list from the current-2,634 names to 3,000. 	<ul style="list-style-type: none"> ▪ Create a written "wish list" and prioritized needs inventory for the library. ▪ Pitches for funding increases from municipalities will be completed in September and October depending on the budgeting schedule for each municipality. ▪ Develop a list of desired programs and use the list with potential funders to help sell sponsorships that are of interest to the prospects. ▪ Specifically target traditionally low contributor segments as potential first-time donors. ▪ Promote the Children's Programming Fund on the web site. ▪ Look for ways to expand the reach of the Library's wish list. ▪ Develop a process for accepting monthly donations via credit card.
Capital Campaign	Within three to five years be prepared to launch a possible Capital Campaign. <i>(See the Facilities and Infrastructure Goal Area)</i>	<ul style="list-style-type: none"> ▪ By YE 2020, determine what actions need to take place to successfully carry out a capital campaign. 	<ul style="list-style-type: none"> ▪ Seek a Development Council Member who is conversant with running capital campaigns—

Accreditation, Programming and Utilization

Principal Goal Areas	Long-Term Goals (Where we'd like to be in 3-5 years)	Annual Goals for 2019-2020 (Major targets for current year)	Strategies and Key Tactics (Best approaches for addressing barriers, opportunities.)
Evolution of the Collection	No Long-term Goal	<ul style="list-style-type: none"> ▪ Adapt the Library collections with materials and new learning technologies of interest to our evolving patron base. 	<ul style="list-style-type: none"> ▪ Determine what additions must be added to the collection in order to better serve our evolving demographics of our patron base. ▪ Continue to add ESL, citizenship and language materials to our collections. ▪
Program Expansion (Children)	No Long-term Goal	<ul style="list-style-type: none"> ▪ Expand children's programming. ▪ Create a separate children's program plan for the year with participation targets for each offering. 	<ul style="list-style-type: none"> ▪ Focus on developing grants and strategic partnerships that will enable us to do more children's programming. ▪ Look for new and different types of programming that will raise visibility of the Library and enable us to engage more people ▪ Develop programs or ancillary offerings (story walk, community garden, etc.) with the support of local businesses. ▪ Explore the feasibility of adding a wider array of weekend and evening programming. ▪ Consider monthly Library-focused events that offer opportunities for broadening exposure and increasing utilization of facilities such as (a fall Trick or Trunk event, Fall Festival, Pet Show, etc.). ▪ Target grandparents as a key prospect group for donating to the Children's Program Fund.
Program Expansion (Adults)	No Long-term Goal	<ul style="list-style-type: none"> ▪ Create a separate adult program plan for the year with participation targets for each offering. 	<ul style="list-style-type: none"> ▪ Identify potential grants or strategic partnerships with businesses or associations that will enable us to do more adult programming. ▪ Look for new and different types of programming that will raise visibility of the Library and enable us to engage more people, particularly programs that get us out of the building, that do not consume huge amounts of staff time and offer opportunities for cost-effective revenue generation. ▪ Develop programs or ancillary offerings (lectures, how-to events, community garden, etc.) of interest to potentially supporting local businesses. ▪ Explore the feasibility of adding a wider array of weekend and evening programming. ▪ Conduct multicultural events all year long that appeal to the many ethnic and cultural groups in our service area and use these events as tools for enhancing cross-cultural understanding. ▪ Consider monthly Library-focused events that offer opportunities for broadening exposure and increasing utilization of facilities such as (a summer Farmer's Market, etc.). ▪ Create a short list of potential sponsors/collaborators for adult programming. ▪ Reach out with programs that help people use our services, i.e. parent/child activities. ▪ Create a series for parents on how to promote literacy with their children and how to choose appropriate books for them.
Patron Growth and Utilization	Increase our registered users to 20,000 by YE 2021.	<ul style="list-style-type: none"> ▪ Determine what measures and metrics we should be utilizing to measure participation and the perceived value of the library across our communities. 	<ul style="list-style-type: none"> ▪ Emphasize program participation as a major source of patron participation growth. ▪ To the extent possible and practical given privacy concerns, capture program participant contact information for use in fundraising.

Visibility and Reputation

Principal Goal Areas	Long-Term Goals (Where we'd like to be in 3-5 years)	Annual Goals for 2019-2020 (Major targets for current year)	Strategies and Key Tactics (Best approaches for addressing barriers, opportunities.)
Marketing/PR and Communications	The Library will be well-known and valued throughout the region we serve as a model Library and community resource.	<ul style="list-style-type: none"> ▪ Create a greater level of understanding among patrons and prospects of how the Library is funded. ▪ Hire a person who will review/revamp website ▪ Improve our ability to create better understanding of the library and its needs/opportunities among residents of the five communities we serve. 	<ul style="list-style-type: none"> ▪ Create a mindset among Board, staff and volunteers that education of the public about the value of the Library starts at the door. ▪ Use the Museum Pass Program as a vehicle for promoting Library Value among users. ▪ Secure volunteers with expertise to develop a marketing/promotion plan and key strategies for the organization. ▪ The Rachel Kohl Community Library web site will become an increasingly important vehicle for awareness building, constituency development and branding. ▪ Conduct a review of the web site to determine what, if any, changes are needed. ▪ Use social media and the Internet as important constituency development tools. ▪ Create a planned set of communications and media vehicles, each mutually supportive, to be used in promoting the value of the Library. ▪ Continue to participate in community events or do roadshows to promote the Library at least once a month.
Strategic Relationships	The Rachel Kohl Community Library will be familiar to, conversant with, understood, and valued among the leadership of our served communities and key constituencies important to our future development and sustainability.	<ul style="list-style-type: none"> ▪ Identify and initiate or improve relations with the top 10 most strategically important organizations and individuals with whom we must develop relationships if we are to grow . 	<ul style="list-style-type: none"> ▪ Continue to develop strong, face to face positive relationships with leaders of those organizations as well as community "movers and shakers" who can impact our progress and sustainability. ▪ Develop and prioritize a list of at least 10 strategically important collaborative partners, and begin converting each to RKL advocates. ▪ Engage leadership in our municipalities for purposes of funding and embracing our mission. ▪ Engage the political leadership in each of the communities we serve so that they become advocates for our mission and vision. ▪ Once a year, conduct a joint Board meeting with the Friends of the Library leadership so that our plans are known and understood.

Staffing, Administration and Infrastructure

Principal Goal Areas	Long-Term Goals (Where we'd like to be in 3-5 years)	Annual Goals for 2019-2020 (Major targets for current year)	Strategies and Key Tactics (Best approaches for addressing barriers, opportunities.)
Talent and Organization <i>(Staff, Volunteers and Administration)</i>	<p>Continue to employ a highly qualified and dedicated staff of individuals who have the capability of managing their respective areas of responsibility with a minimum of oversight.</p> <p>Within three years hire a part-time development person to oversee fundraising and marketing.</p> <p>Begin offering benefits to all full-time employees.</p>	<ul style="list-style-type: none"> ▪ The board will spend a portion of one meeting a year specifically focusing on staff needs, concerns, ideas, etc. ▪ Seek an experienced volunteer who is willing to serve as a grant writer. 	<ul style="list-style-type: none"> ▪ Utilize the salary and benefits survey that is being done by the Haverford library. ▪ Determine how, and at what level, we will fund a pension package for our executive director. ▪ Conduct an annual Library, Volunteer Recognition event. ▪ A portion of one Board meeting every year will be devoted to a presentation by Executive Director reviewing staff concerns, ideas, needs, etc.
Facilities and Infrastructure	<p>By YE 2025 or sooner create an alternative that affords convenient access for individuals from the communities we serve as well as high visibility for the Library.</p> <p>In 2020 apply for another Keystone Grant.</p>	<ul style="list-style-type: none"> ▪ Establish a long-term facilities and space needs/usage plan/strategy that includes how the proceeds from a capital campaign would be used. 	<ul style="list-style-type: none"> ▪ Identify what our most critical near-term capital expenditure needs are that will require our attention in the next 1-3 years. ▪ Develop a written long-term space and facilities plan for the Library related to remaining in our current location or establishing a presence elsewhere. ▪ Base all expansion decisions on our ability to staff and manage the programs and activities. ▪ Seek donations from area corporations of comfortable furniture for quiet and reading areas. ▪ In the event it is decided to remain in our current location, reconfigure and expand the space to include individual study spaces, small community meeting rooms, tutoring spaces and programming spaces. Consider adding a Bookmobile.
Measurement and Evaluation	<p>By YE 2019 be in a position to demonstrate the value of the Library to our communities based upon objective results data gathering and anecdotal stories of individual transformation.</p>	<ul style="list-style-type: none"> ▪ Increase our ability to understand patron satisfaction, issues, needs and concerns through a formal program of measurement. ▪ By YE 2019, have in operation a comprehensive outcomes measurement process including a set of indicators that can be used to promote the impact of our programs. 	<ul style="list-style-type: none"> ▪ We will measure impacts as well as outputs. ▪ Focus not only on numbers of patrons served, but on measurable impacts of their exposure to the Library. ▪ Determine what we can effectively measure and how to gather the data. ▪ Continue to use Library Value Calculator stats in all PR pieces and fundraising---raising the awareness

Rachel Kohl Community Library 2019-2020 Annual Goal Summary

Principal Goal Areas	Annual Goals for FY 2019-2020 (Major targets for current planning year)	Status On Plan Behind At Risk Done
Governance		
Board Development and Engagement	Utilize our 12-member non-fiduciary Development Council more fully.	Behind
	Organize a working committee structure at the Board level.	On Plan
Long-term Sustainability	Maintain our connection with EveryLibrary.org for pro-bono assistance in increasing levels of revenue support from all contributing segments including municipalities.	On Plan
	By YE 2019, expand the Development Council to 16 committed individuals.	On Plan
Finances, Revenue Generation and Fundraising		
Financial Management, Transparency and Compliance	Complete a 2020 operating budget by December 31, 2019.	
	Add \$\$ to our reserve fund in 2020 (Amount TBD as part of the budgeting process).	
	Publish the current Annual Report on the web site	Done
	Review and update the by-laws as necessary.	Done
Governmental Revenues (State and Local)	Complete the mortgage restructuring by January 1, 2019 @ 3.5% over 30 years (which will improve cash flow by \$24,000 annually). (See Facilities and Infrastructure Section for Keystone Grant goals).	Done
Fundraising	Raise at least \$50,000 net from our annual fund drive.	On Plan
	Raise the number of individual donors from the current 563 active donors now to 600 and the total average gift by 15% increase.	On Plan
	Expand our donor prospect list from the current-2,634 names to 3,000.	On Plan
	Establish a Children's Programming Fund with a target of \$5,000 annually to help underwrite programs.	
Capital Campaign	By YE 2020, determine feasibility of successfully carry out a capital campaign.	On Hold
Accreditation, Programming and Utilization		
Evolution of the Collection	Adapt the Library collections with materials and new learning technologies of interest to our evolving patron base.	
Program Expansion (Children)	Expand children's programming.	
	Continue children's program plan for each month with participation targets for each offering.	
Program Expansion (Adults)	Continue adult program plan for each month with participation targets for each offering.	
Visibility and Reputation		
Marketing/PR and Communications	Create a greater level of understanding among patrons and prospects of how the Library is funded.	Ongoing
	Recruit an Intern to review marketing/PR materials.	Done
	Improve our ability to create better understanding of the library and its needs/opportunities among residents of the five communities we serve.	Ongoing
Strategic Relationships	Identify and initiate or improve relations with the top 10 most strategically important organizations and individuals with whom we must develop relationships if we are to grow.	
Staffing, Administration and Infrastructure		
Talent and Organization (Staff, Volunteers and Administration)	The board will spend a portion of one meeting a year specifically focusing on staff needs, concerns, ideas, etc.	
	Seek an experienced volunteer who is willing to serve as a grant writer.	

Facilities and Infrastructure	Establish a long-term facilities and space needs/usage plan/strategy that includes how the proceeds from a capital campaign would be used.	Behind
	Determine what kind of system we will install within the \$170,000 budget and complete the replacement of the HVAC system in April-June 2019.	Done
Measurement and Evaluation	Increase our ability to understand patron satisfaction, issues, needs and concerns through a formal program of measurement	Ongoing
	By YE 2019, have in operation a comprehensive outcomes measurement process including a set of indicators that can be used to promote the impact of our programs.	On Plan

Instructions for Completing the Tactical Sections of the Plan

- First, assign someone from the board or key staff the responsibility for overseeing each tactical plan section. The individual assigned to manage/oversee each section should be the most senior staff or board person (for example: Board Governance would go to the Chair of the Nominating Committee, Programs to the senior staff person in charge of programs, etc.)
- Next, the individuals charged with overseeing each tactical section should meet with the appropriate staff and board team members and review the action steps, eliminating any that are not relevant, have been completed or cannot be done. Other action steps should be changed as appropriate.
- Each action step should be assigned a priority level. Use the Shading feature in Word (the little paint bucket) to fill in the appropriate colors.
- Next, assign a due date or target completion date for each action step in the Date Due Column.
- Indicate who will have primary responsibility for each action step. In the Primary Responsibility Column (names or initials may be used).
- List any team members who will be supporting the action step in the Column labeled Team Members.
- If there is an incremental cost (not budgeted) associated with the action step, enter the estimate in the Estimated Incremental Cost Column.
- Finally, assign a status level in the extreme right-hand column that indicates the status. Each responsible individual is assigned the responsibility of updating the status column at the end of every month by inserting the appropriate fill color. Brief comments may be made in these cells as well related to status. For example, if an action step is in the Red you might want to enter the reason.

**Rachel Kohl Community Library
(Governance)
Tactical Plan 2019-2020**

2019-2020 Tactical Plans Status as of (7/20/19)

Target/Strategy (From Annual Goals and Right-Hand Column of Strategic Plan Goal Areas)	Action Steps for Each Target and/or Strategy	Date Due	Primary Responsibility	Team Leaders/ Members	Estimated Cost	Priority Top Mid Low	Status On Plan Behind At Risk Done
Board Development and Engagement							
Utilize our 12-member non-fiduciary Development Council more fully.	Appoint/Update a visible and willing chair to head the Development Council		Randy				On Plan
	Create a charter for the Development Council that utilizes members help improve Library sustainability, high-level relationships and to bring needed connections and resources to the Library.						Done
	Develop stronger & regular communication with Development Council members, e.g. Share minutes of the board meeting with them..	asap	Randy/E.D.			Top	Behind
	Explore with the Development Council establishing an annual "Friend-raising" event, e.g. 40 th Anniversary Celebration	asap	Randy/E.D.				Behind
	Engage the Development Council in identifying potential resources that would contribute materials etc. to the annual campaign.	asap	Randy/E.D.				Behind
	The Board will continue to utilize our Development Council and populating it with individuals who have the capability to connect and advocate on our behalf with local municipal leadership and who bring needed skills to our table.		Randy/E.D.				On Plan
	Identify potential future Board members and invite them to participate on the Development Council in order to help ensure the future strength of the Board.		Randy	Randy/Susan/Jean			On Plan
	Ensure that the Development Council is ethnically and racially diverse.	12/19	Board			Mid	On Plan
Organize a working committee structure at the Board level. Committees will be led by a board member and staffed with non-board volunteers and/or staff as appropriate.	The board will create and staff the following committees: Fundraising/Development, Planning, Executive and others as needed..	12/19	Board			Top	Behind
	Create a standing Fundraising Committee to include at least 1-2 permanent Board members and three Development Council Members willing to lead fundraising efforts.						Behind
Other	Facilitate open Township Board positions/formal to RKL and conduct orientation for new members	12/31/18	Twp/Bd	Greg/E.D/		Top	On Plan

Section continues on next page

Long-term Sustainability							
Maintain our connection with EveryLibrary.org for pro-bono assistance in increasing levels of revenue support from all contributing segments including municipalities.	Continue connection with EveryLibrary.org for pro-bono assistance in strengthening our municipal revenues.	Ongoing	Board/E.D.	E.D., Jean,		Mid	Ongoing
By YE 2020, expand the Development Council to 16 committed individuals.	Identify at least 10 new prospects for the Development Council.					Mid	Ongoing
	Meet with prospects and complete a recruiting process.	???	Board	Jean			
Other	Our financial priorities going forward will be employee compensation equity, continuing our reserve policy and fund and facilities development.	Ongoing	Board/E.D.	E.D./ Board/ Treasurer		Top	Ongoing
	Ensure that other libraries in our region are aware of the progress we are making.	Ongoing	E.D./Bd	E.D./Bd			Ongoing
	Identify and maintain contact with individuals who may be important to a future referendum.	Ongoing	E.D./Jean	Danielle McNichol			Ongoing
	Invest time in becoming more adept at utilizing Little Green Light as a donor development and segmentation program.	Ongoing	Board/E.D.	Jean/Susan S		Mid	On Plan
	Continue to Improve our ability to generate news in area newspapers.	Ongoing	E.D./Staff				Ongoing

Rachel Kohl Community Library
(Finances, Revenue Generation and Fundraising)
Tactical Plan 2019-2020

Target/Strategy <i>(From Annual Goals and Right-Hand Column of Strategic Plan Goal Areas)</i>	Action Steps for Each Target and/or Strategy	Date Due	Primary Responsibility	Team Members	Estimated Cost	Priority Top Mid Low	Status On Plan Behind At Risk Done
Financial Management, Transparency and Compliance							
Complete a 2020 operating budget by December 31, 2019.	The 2020 Budget will include a provision for expanding/growing reserves.	12/31/19	Board/E.D.	Jen, SusanS		Top	On Plan
Add \$\$ to our reserve fund in 2020 (Amount TBD as part of the budgeting process).	Continue financial reserves policy and adhere to it.	12/31/20	ED/Treasurer				On Plan
Our fiscal and financial management will be accurate and transparent at all times.	Publish 2019 annual report on the web site.	2/20	Board/E.D.	Staff SusanS.		Low	On Plan
Review and update the by-laws as necessary.	Check by-laws for inconsistencies	1/20	Board/E.D.	Brian		Top	On Plan
Other							
Governmental Revenues (State and Local)							
<i>(See Facilities and Infrastructure Section for Keystone Grant goals).</i>	Continue pitches for funding increases from municipalities will be completed in May and June depending on the budgeting schedule for each municipality.	Ongoing 6/20	Board/E.D.	SusanS/jen, etc		Top	On Plan
	Establish funding targets for each municipality based on a per-capita. Seek dollar specific funding increases from each of the five communities we serve on an annualized basis, (particularly the municipalities that are in the lowest per-capita funding tiers).	2/2020	Board/E.D.	EveryLibrarian/SusanS, Jean, Jen		Top	On Plan
	Work with volunteer advisors on developing stronger contacts among municipal leaders.	ongoing	Board/E.D.	EveryLibrarian/SusanS, , Randy,		Top	Ongoing
	Identify prospects and host a donor event once a year for large donors.	4/2020	Board/E.D.	Jean & Randy		Top	Behind
	Host a Library Legislative Engagement function...get Supervisor/liaison.	4/2020	Board/E.D.	Randy & E.D.		Mid	On Plan

Section continues on next page

Fundraising							
Raise at least \$50,000 net from our annual fund drive. Raise the number of individual donors from the current 563 active donors now to 600 and the total average gift from \$105 to \$120, a 15% increase.	Create a written "wish list" and prioritized needs inventory for the library that includes a list of desired programs and use the list with potential funders to help sell sponsorships that are of interest to the prospects.	2/28/20	E.D.			Top	On Plan
	Look for ways to expand the reach of our wish list.						On Plan
	Develop a process for accepting monthly donations via on-line credit card transactions.	???	Done on Website?	Jen/E.D.			
Expand our donor prospect list from the current-2,634 names to 3,000.	Develop a plan and process for how to specifically target traditionally low contributor segments as potential first-time donors.	@desk	E.D./Staff				On Plan
Children's Program Support							
	Develop an approach for targeting grandparents as a key prospect group for donating to the Children's Program Fund.	3/20	E.D.			Mid	On Plan
Other	Pitches for funding increases from municipalities will be completed in May and June depending on the budgeting schedule for each municipality.		E.D. et al			Mid	Ongoing
Capital Campaign							
By YE 2020, what actions need to take place to successfully carry out a capital campaign.	Seek a Development Council Member who is conversant with running capital campaigns.	??	Board/E.D.	SusanS/		Mid	Behind
	Talk with that Council Member, to explore feasibility for a future capital campaign	2/20	E.D./Jean			Mid	Behind

Rachel Kohl Community Library
(Accreditation, Programming and Utilization)
Tactical Plan 2019-2020

Target/Strategy (From Annual Goals and Right-Hand Column of Strategic Plan Goal Areas)	Action Steps for Each Target and/or Strategy	Date Due	Primary Responsibility	Team Members	Estimated Cost	Priority Top Mid Low	Status On Plan Behind At Risk Done
Evolution of the Collection							
Adapt the Library collections with materials and new learning technologies of interest to our evolving patron base.	Determine what additions must be added to the collection in order to better serve our evolving demographics of our patron base.					Mid	
	Add ESL, citizenship and language materials to our collections.					Mid	
	Continue to move out of books and CDs by utilizing new learning technologies that consume less space and are becoming more popular and sought after.					Mid	
Program Expansion (Children)							
Expand children's programming.	Continue children's program plan for the year with participation targets for each offering.					Top	
	Focus on developing grants and strategic partnerships that will enable us to do more children's programming.					Top	
	Look for new and different types of programming that will raise visibility of the Library and enable us to engage more people.					Top	
	Develop programs or ancillary offerings (story walk, community garden, etc.) with the support of local businesses.			Mindy		Top	
	Explore the feasibility of adding a wider array of weekend and evening programming.					Mid	
	Create a Grandparents or "Special People" program	Winter 2019	ED/Mindy			Mid	
	Consider monthly Library-focused events that offer opportunities for broadening exposure and increasing utilization of facilities such as (a fall Trick or Trunk event, Fall Festival, Pet Show, etc.).					Mid	

Section continues on next page

Program Expansion (Adults)							
Create a separate adult program plan and calendar for the year with participation targets for each offering.	Identify potential grants or strategic partnerships with businesses or associations that will enable us to do more adult programming. Create a short list of potential sponsors/collaborators for adult programming.	2/20	Staff	Sara/Greg		Top	
	Look for new and different types of programming that will raise visibility of the Library and enable us to engage more people..					Mid	
	Develop programs or ancillary offerings (lectures, how-to events, community garden, etc.) of interest to potentially supporting local businesses. Identify at least five possibilities and present to the board. Consider monthly Library-focused events that offer opportunities for broadening exposure and increasing utilization of facilities such as (a summer Farmer's Market, etc.).		E.D.	Staff/Sara		Mid	
	Explore the feasibility of adding a wider array of weekend and evening programming... consider effect on open hours		E.D.			Mid	
	Identify community organizations with which to partner in offering space for Library produced programming.		E.D./ Staff			Mid	
	Conduct multicultural events all year long that appeal to the many ethnic and cultural groups in our service area and use these events as tools for enhancing cross-cultural understanding.		E.D./ Staff			Mid	
	Reach out with programs that help people use our services, i.e. parent/child activities.		E.D./ Staff			Mid	
	Create a series for parents on how to promote literacy with their children and how to choose appropriate books for them.		E.D./ Staff			Mid	
	Pursue a collaborative arrangement with the middle school for programming space for children's summer programs.		E.D./ Staff			Mid	
	Identify other organizations with which we might partner in offering space for Library produced programming.		E.D./ Staff			Mid	
Continue investing in "Book Club in a Bag."	Ongoing				Mid		
Patron Growth and Utilization							
Determine what measures and metrics we should be utilizing to measure participation and the perceived value of the library across our communities.	Using measurement data, brainstorm ideas on how we might increase program participation as a major source of patron participation growth.		E.D./ Staff			Mid	
	Use Value Calculator stats in all PR pieces and fundraising---raising the awareness.		E.D./ Staff			Mid	Ongoing
	Use the Museum Pass Program as a vehicle for promoting Library Value among users.		E.D./ Staff				Ongoing
	Determine the feasibility/cost/benefits related to adding a Bookmobile to our current programming. (Consider sharing a Bookmobile with another library).		Board/ E.D./ Staff			Low	Ongoing
Emphasize program participation as a major source of patron participation growth.	Explore the how's and where's we might be better able to gain new patrons among program participants.						Ongoing

**Rachel Kohl Community Library
(Visibility and Reputation)
Tactical Plan 2018-2019**

Target/Strategy (From Annual Goals and Right-Hand Column of Strategic Plan Goal Areas)	Action Steps for Each Target and/or Strategy	Date Due	Primary Responsibility	Team Members	Estimated Cost	Priority Top Mid Low	Status On Plan Behind At Risk Done
Marketing/PR and Communications							
Create a greater level of understanding among patrons and prospects of how the Library is funded.	Identify and schedule community events to promote the Library at least once a month.	Ongoing	E.D	Sara		Mid	On Plan
	Develop a planned set of communications and media vehicles, each mutually supportive, to be used in promoting the value of the Library.		Staff	Intern			On Plan
	Promote a mindset among Board, staff and volunteers that education of the public about the value of the Library starts at the door.					Mid	On Plan
	Secure volunteers with expertise to develop a marketing/promotion plan and key strategies for the organization.			Intern		Mid	Behind
						Mid	
Website Update	review/update web page as needed	12/19	E.D./Board	E.D., staff		Top	On Plan
The Rachel Kohl Community Library web site will become an increasingly important vehicle for awareness building, constituency development and branding.	Move the donation button on the web site to the landing page and include a donate button on every page.					Top	Done
	Conduct a review of the web site to determine what, if any, changes are needed.	6/20				Top	Ongoing
Improve our ability to create better understanding of the library and its needs/opportunities among residents of the five communities we serve.	Produce a brochure highlighting our "message" to residents.					Mid	Done
	Use social media and the Internet as important constituency development tools. Determine how to increase the use of social media and the Internet as important constituency development tools.					Mid	Ongoing
Other	Use the Museum Pass Program as a vehicle for promoting Library Value among users.					Low	Ongoing
	Use the Library Value Calculator as a fundraising and marketing data source and tool.					Low	Ongoing

Section continues on next page

Strategic Relationships							
Identify and initiate or improve relations with the top 10 most strategically important organizations and individuals with whom we must develop relationships if we are to grow.	Identify and prioritize a list of at least 10 strategically important collaborative partners and begin converting each to RKL advocates. Develop strong, face to face positive relationships with leaders of those organizations as well as community "movers and shakers" who can impact our progress and sustainability.		Board/E.D.			Top	On Plan
	Each board member will be responsible for engaging leadership in their municipality for purposes of funding and embracing our mission and to encourage them to become advocates for our mission and vision.		Board			Top	On Plan
	Once a year, conduct a joint Board meeting with the Friends of the Library leadership so that our plans are known and understood.	1/22/20	E.D./Board	Jean		Mid	On Plan

Rachel Kohl Community Library
(Staffing, Administration and Infrastructure)
Tactical Plan 2019-2020

Target/Strategy (From Annual Goals and Right-Hand Column of Strategic Plan Goal Areas)	Action Steps for Each Target and/or Strategy	Date Due	Primary Respon- sibility	Team Members	Estimated Cost	Priority Top Mid Low	Status On Plan Behind At Risk Done
Talent and Organization (Staff, Volunteers and Administration)							
The board will spend a portion of one meeting a year specifically focusing on staff needs, concerns, ideas, etc.	Devote a portion of one Board meeting every year to listening to key staff in terms of their concerns, ideas, needs, etc. through Director's monthly Report.	ngoing	E.D./Board	E,D.			On Plan
	Establish a proposed time table and salary parameters.	1/20	E.D./Board			On Hold	
Seek an experienced volunteer who is willing to serve as a grant write until a PT development director can be hired. Hire a website person	Develop a job description for the future development director.		E.D.	E.D.			Behind
	Use Rotary grant to fund website hire.	12/19	E.D.			Mid	Behind
Other	Utilize the salary and benefits survey that is being done by the Haverford library.		E.D./Board				On Plan
	Determine how, and at what level, we will fund a pension package for our executive director.	On hold	Board			On Hold	Behind
	Conduct an annual Library, Volunteer Recognition event.	11/19	Friends	E.D./Friends President			At Risk
Facilities and Infrastructure							
Establish a long-term facilities and space needs/usage plan/strategy that includes how the proceeds from a capital campaign would be used. Base all expansion decisions on our ability to staff and manage the programs and activities.	Appoint an ad-hoc committee made up of the board and ED to develop recommendations on long-term space utilization or alternatively, a move to a new location.		Board/E.D.			Top	Ongoing
	Identify what our most critical near-term capital expenditure needs are that will require our attention in the next 1-3 years.		Board/E.D.			Top	Ongoing
	Determine what the long-term goal should be for the location of the Library. Base all expansion decisions on our ability to staff and manage the programs and activities. In the event it is decided to remain in our current location, reconfigure and expand the space to include individual study spaces, small community meeting rooms, tutoring spaces and programming spaces.						Top
Keystone Grant HVAC. Grant accepted 9/20/18! System Installation in process.	Sync system install within the \$170,000 budget and complete the replacement of the HVAC system by April 2020.	4/20	Board/E.D.	E.D./Greg		Top	On Plan
Other	Ask Friends to purchase or seek donations of comfortable furniture for quiet and reading areas from corporations in our region.	???	Board/E.D.	E.D./Friends President		Mid	????

Measurement and Evaluation							
Increase our ability to understand patron satisfaction, issues, needs and concerns through a formal program of measurement.	E.D. to meet quarterly with staff to discuss the implementation of the Strategic Plan and where we are in terms of meeting our Mission and Vision.	4/30/20	Board/E.D.			Mid	On Plan
	Develop a survey to measure Customer Service...use on-line Monkey Survey or like; send link via Township newsletters and/or have survey @ library	1/20	E.D/volunteer			Mid	At Risk
By YE 2019, have in operation a comprehensive outcomes measurement process including a set of indicators that can be used to promote the impact of our programs.	Determine what we can effectively measure and how to gather the data. We will measure impacts as well as outputs. Focus not only on numbers of patrons served, but on measurable impacts of their exposure to the Library. Note: message should include RKL \$2.3 million value of library services, e.g. books, DVD, museum passes, programs, etc. on a \$400,000 budget.	4/30/19	E.D.			Top	On Plan

Rachel Kohl Community Library Key Measures for 2016-2022

As of 6/17/19

Key Measure Areas	2016 Actual	2017	2018	2019	2020	2021	2022
Utilization Measures							
Total registered users							
# of registered Library card holders as of 9/1/18	15,622	15,822	16,182				
Circulation of electronic materials	29,714	27,244	27,255				
Circulation of physical items	145,858	124,822	131,461				
Total circulation of materials	175,572	152,066	158,716				
# of Children's Books borrowed'	80,982	79,893	81,150				
Total visits for year	88,929	73,000	74,691				
Total visits to the Library web site	33,500	31,600	30,300				
# of patrons accessing the internet via our computers							
Average \$ value of Library to representative cross section of patrons		\$2.3 million					
Average ROI to Community by patron	-9,119	418					
Financial Measures							
Target/total revenues raised	333,196	423,941	532,651				
Target budget at beginning of year	413,718	432,178	454,415	597,325			
Actual direct public support raised from annual appeal							
Actual Total revenues	428,355	405,134	532,562				
Actual Expenses for full year	420,014	404,716	371,693				
Actual net assets at yearend	8,340		160,870				
Reserve Fund \$\$ set aside	0	0	0	\$1,000/month			
Average ROI to community by patron	-9,119	418					
Revenues and Fundraising Measures							
# of individual prospects on data base			2646				
Total number of donors			595				
# of under \$100 individual donors			543				
# of under \$101-\$250 individual donors			40				
# of \$251-\$999 individual donors			6				
# of \$1,000+ donors			6				
\$ Total Individual Gifts	29,585						
\$							
\$ Rotary \$ received	10,000	5,000	7,500	?			
# of Grants Submitted to Foundations et al			2	Keystone & ALA? & Rotary	85,000		
# of Granting Foundations			2	Keystone & Rotary			
\$ Total Foundation Grants			10,000				
# of Business prospects on database			?	192			

# of Business and Corporations Donating			7			
Total \$ Donated by Businesses and Corporations		500	900			
# of \$500+ business/corporate donors			1			
\$ Grant from Friends of the Library	3,376		5,409			
\$ Net fees from goods sold	376		2,653			
\$ Revenues from late fees	14,385		16,569			
\$ From State	40,637	63,000	40,150			
\$From County	8,416	7,869	7,869			
\$ From Chester Heights	10,000	12,655	12,655			
\$ From Concord	178,000	185,000	185,000			
\$ From Chadds Ford	8,000	8,000	8,000			
\$ From Thornbury	30,000	40,140	40,140			
\$ From Bethel	35,000	35,000	35,000			
Individual giving as a % of total revenues		11.9	14.5			
State revenues as % of total revenues		16.4	10.6			
Municipal revenues as % of total revenues		63.4	66.6			
Program revenues as % of total revenues						
Business donations as % of total revenues						
Collection Measures						
Catalogued items	62,509	34,802	38,387			
Print Materials	34,732	30,323	32,705			
E Books	21,879	25,359	28,056			
Audio Units physical	3,083	2,863	3,004			
Audio Units downloadable	7,835	8,599	9,279			
Video Units physical	1,653	1,607	1,637			
Video Units downloadable						
Current periodicals print	45	49	56			
Current periodicals electronic	219	229	193			
Current serial subscriptions	45	51	59			
Local other electronic collections	43	42	43			
State electronic collections	22	23	23			
Loans to other libraries	5,689	4,764	5,297			
Loans from other libraries	19,406	16,960	21,008			
Participation Measures						
Total Registered Users	7,843	8,408	16,182			
Annual number of library visits	88,929	72,781	74,691			
Circulation of Children's Materials	80,982	76,893	81,150			
Circulation of Physical Items	145,858	124,822	131,461			
Circulation of E Books	29,714	27,244	27,255			
Total circulation of all materials	175,572	152,066	158,716			
Total Collection use	175,572	152,066	158,716			
Total annual service hours	2,862	2,630	2,630			
# of children's programs (11 and under)	263	202	344			
# of young adult programs (12-18)	20	10	10			
# of adult programs (19+)	184	89	139			
Children's program attendance	6,731	5093	6,659			
Young adult program attendance	146	104	48			
Adult program attendance	1,316	1,060	1,579			
Total RK Library programs	467					

Total RK Library Program Attendance	8,193	6,257	8,286			
# of Participants in STEM programs			1,369			
# of Participants in Slime Labs						
# of participants in Summer Reading Programs			521			
# of meetings hosted						
# of people using meeting rooms						
# of Museum Passes borrowed	0		241			
Total # attending Library events	8,193	6,257				
# of individual uses of Library computers	??? 3,298	2,908	2,806			
# computer usage (in minutes)			??? 1,599			
Talent Measures						
FT Staff	2	2	3			
PT Staff		11	8			
Volunteer staff #						
Volunteer staff hours total	1976	1872	1746.5			

Annual Outcomes Report

(to be used w/Board Mtg. Agenda)

(Instructions: Once the plan is in a final state, copy the goal areas and goals to this form. Then, while the year, use this form to record accomplishments and progress.)

Principal Goal Areas	Annual Goals for 2017-2018 (Major targets for current planning year)	Outcomes (Accomplishments achieved in relation to goals for the current year.)
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•
	•	•