DRAFT
Strategic Plan 2014-2016

This document is to be used as a guideline to plan for staffing, services, technology, budgets and communication for fiscal years 2014, 2015 and 2016. It is a working document subject to change based on income (revenues) and changes in the library political and social environment. This document will be reviewed each year during the annual Public Hearing in September, as needed.

This strategic plan is based on the Board of Trustees approved Mission and Vision Statements which were recommended and reviewed by the staffs of the administrative headquarters and the library branches during meetings held in 2003 and 2004. As of this plan approval it is believed that the mission and vision statements are still valid.

Mission Statement
Iosco-Arenac District Library includes AuGres Community Library, East Tawas Library, Omer Little Eagles Nest Library, Robert J. Parks Library (in Oscoda), Plainfield Township Library (in Hale), Mary Johnston Memorial Library (in Standish), Tawas City Library, Whittemore Library, and the Administrative Headquarters (in East Tawas).

Our mission is to provide friendly, helpful and knowledgeable service to people of all ages by enriching their quality of life through traditional resources and technology, and to promote the joy of life-long learning.

Vision
*Continue and improve mutual cooperation between Iosco-Arenac District Library, government entities, branch library staff and our community.
*Provide and maintain a comprehensive collection in a variety of formats based on patron and individual branch library needs.
*Be proactive and creative in anticipating and responding to community needs for programs and services.
*Pursue and provide current library technology and education, responsive to community and staff needs.
*Provide an interactive and welcoming atmosphere by capitalizing on the advantages of small-community living.

Profile
Iosco-Arenac District Library was formed under Michigan Public Act 24 of 1989, and recognized as a District Library in November of 1990.

The administrative headquarters at 120 W. Westover Street, East Tawas MI 48730, does not operate as a public service library outlet.

As of January 2014, the District provides services to/for the eight Library Branches including the following:
*Revenue Sharing of the District Millage to Units of Government Owning and Operating Library Branches (1/2 of the Actual Amount Received) for Library Operations
*Children's and Teen Services and Program Coordination
*Funding for Adult Programs
*Collection Maintenance Assistance with Selection and De-selection (Weeding), Marketing of the Collections In-House, Repairs, and Recommendations for Shelving and Display Arrangements
*Consulting and Training (Including Continuing Education)- Includes Funding for Substitutes, Registration Fees, Travel and

Lodging to State Conferences (MLA and Rural Library Conference)

*Delivery of Materials (Mel Delivery three days per week, Branch Library Delivery two days per week, Postal delivery for ALA and OCLC)

*Interlibrary Loan (MelCat participant, Valley Library Consortium, OCLC, ALA)-Coordination of Borrowing and Lending of Materials to Fill Borrower Requests (Both Statewide, National and International)

*Ordering, Purchasing, Cataloguing and Processing of Intellectual Property (Books, CDs, Database Subscriptions, Magazines and Local Newspapers, etc.)

*Ordering, Purchasing and Delivery of Equipment Including Computers, Scanners, Printers, Fax Machines and Photocopiers

*Ordering, Purchasing and Delivery of Selected Library and Office Supplies

*Preparation of Grant Applications for Library Programs, Services and Equipment

*Reference Assistance and Referral Where Needed and/or Requested by the Branch Library Staff

*Statistical Recordkeeping Including Annual State Aid Reports

*Monitoring of the popular media (TV, radio, newspapers, Internet) for author tours, book discussions, upcoming publications, readers advisory

*Substitute Staff Allowances (Substitute Staff are District Employees) for Vacations/Sick Leave

*Technical Assistance/Maintenance of Computers, Printers, Fax Machines and Photocopiers (Hardware and Software)-Full-time Technical Support Staff

*Library Advocacy and Outreach Including Advertising, Public Speaking, Monitoring Legislation Actions, Forwarding Internet Library News, and Support of 1st Amendment Rights

*District Website (Up-to-date Links, How-To Directions and Local Library Information)

*Purchase E-mail Accounts for Branch Library Managers

*Direct Broadband Internet Connections (Fiber Broadband or T-1+ and Wireless at All Branches) and Diagnostic Connections
*OverDrive Downloadable Audio Book and E-Book Consortium
*Troubleshooting Assistance for Borrowers Using District Computers and District Automation (Via Telephone and the Internet)
*Automated Circulation, Searching, Requesting, Hold Slip Notice Production, Remote Renewals and E-mail Notifications
*Mailed and E-mailed Notification of Fines and Fees for Overdues to Borrowers
*Tax Form Ordering and Distribution - Support of the Volunteer Income Tax Assistance Program (AARP)
*Primary Vendor Contact for Supplies, Equipment and Contracted Services (Utilizing State and Cooperative Discount Plans)
*Provide the Opportunity for Scheduled Branch Librarian Meetings at Different District Library Locations

In August 2004, voters in Arenac County and Iosco County approved a 0.5 millage for ten years (through 2013) and then renewed for an additional 10 years (through 2023) in 2012. The millage (subject to Headlee reductions and tax captures is .4912 as of December 2013) is used to increase book, audio book, and periodical purchasing; to support technology and automation; and to assist with the operation of the branch libraries.

A "revenue sharing" fund will be distributed twice a year. One half of the actual revenue received from the millage will be given to those units of government currently responsible for the day-to-day operation of library branches. The "revenue sharing" fund is disbursed based on a formula determined by the District Board of Trustees with input from the units of government. The "revenue sharing" fund is restricted to Library Operating Purposes Only.

New Millage Income will be approximately $800,000 for 2014.

In addition to the voted millage, Iosco-Arenac District Library also receives funding from:

> Penal Fines-Iosco County and Arenac County
> State Aid (Per Capita Rate Adjusted Annually by State Government-2010 Census Population 41,786
> Gifts and Memorials
> Grants
> Overdue Fines/Fees
> Interest Earned on Investments
> Miscellaneous Revenue

Iosco-Arenac District Library currently employs seven full-time and two part-time staff, and seventeen substitutes (used by branch libraries). Custodial services for the Administrative Office are contracted.

Iosco-Arenac District Library does not manage library branch buildings and local branch library staff. The District also does not determine library branch hours of operation.

The District does not own a building, but rents the space used for the administrative offices from the City of East Tawas (5-year lease with two renewal options in DRAFT for 2013).

Technology
The SirsiDynix Horizon automation "go-live" date was July 6, 2005.

Internet speeds were improved in October 2007 for all eight library locations to T-1. By 2011, seven of the eight branches received additional T-1 lines to handle increased demand. In February 2013, six of the eight locations were upgraded to fiber as part of the Federal Stimulus program Reach 3MC. Investigations are in

progress to find funding and support for fiber in the two remaining locations of Hale and Whittemore.

A revised and renewed contract with MERIT was signed for a three-year period (July, 2013-June, 2016).

The District remains dependent on Universal Services Funding for discounted Internet. As of 2013, an 84% discount is approved based on an average for the Public School Districts' reduced school lunch programs.

A three-year Technology Plan (July 1, 2011-June 30, 2014) was approved by the Library of Michigan. The Technology Plan includes a schedule for replacing/upgrading computers, and a plan for training of Headquarters and branch library staff and patrons. A new three-year plan is in development for July 1, 2014-June 30 2017.

The District will continue to contract with the Valley Library Consortium for Automation Services. It is anticipated that potential new automation vendors will be explored beginning in 2015.

In 2010 the District was awarded a Round 2 BTPL Grant (Federal Stimulus Funding) for 16 new Public Access computers and supporting hardware, software and furnishings.

A schedule of replacements for public access computers will be maintained to ensure that the computers are replaced within six years.

A phase-out of Windows XP Pro will be completed by the end of 2014.

By early 2014, all branch libraries will have Envisionware time and print management software installed and operational.

Starting in early 2014, the District will offer "Tech Tuesday" clinics with one-on-one help provided by contracted service providers. The goal will be to have these at 4 locations.

Starting summer of 2014, provide funding for computer classes that take place before or after library hours.

Begin to explore more use of Cloud-based services for shared public and staff calendars, permission slips, internal messaging and other internal communications between branch libraries and Headquarters.

Consider using a web-based email client in addition to the current dedicated client to improve access for staff to their email.

The District will continue to employ a full-time (40 hours per week) technology services coordinator, and will support ongoing continuing education opportunities for this employee.

Explore the possibility of self-service network scanners for each branch library.
Explore the possibility of paying for branch library telephone service utilizing VOIP (voice over Internet protocol) for all library locations.

Materials
The materials budget (adult, teen and children) for 2014 will be $215,000. Branches will be annually surveyed for popular authors and in some cases eight copies of a title will be purchased. Increased demand for downloadable materials (mainly e-books) will also require increased budgets. The materials budget includes books, CD books, downloadable e-books and audio, databases,

periodicals and newspapers. Upcoming budgets may also include downloadable movies and music.

Each branch library will be allowed to request book and/or CD book titles for purchasing and keeping for their individual collections (adult, teen and/or children) with the District keeping a running count of materials expenditures to keep equal spending limits in line. A $2,000 allowance is set up annually for each branch library for these purchases. No carryover will be allowed from one year to the next.

The Administrative Assistant/Bookkeeper has set up "classes" in the bookkeeping program to keep track of each library's expenditures. Keeper books remain defined as books assigned to a branch library but still available for interloan (unless designated for in-house reference use only).

The District will review collection development policies and procedures (selection, de-selection, format, scope) again in 2015.

Revenue Sharing
Following the agreed upon disbursement plan (approved by the District Library Board and presented in writing to the Cities and Townships owning/operating library buildings) the amount estimated for branch library operations will be approximately $400,000 for 2014. This may be used as the local government sees fit as long as it will be used for library purposes only and is an allowed expenditure under the millage ballot language.

The millage renewal effective December 2014 (revenues for 2015) will require an evaluation of the formula used for disbursement. One representative will be invited from each government unit managing a library branch, to provide input and ideas for the Board to use on formula development.

District Vehicles

The reserved fund is $43,437 at the end of 2013. There is no plan to replace a vehicle in 2014. Possible replacement of one vehicle may be explored in 2015.

Interlibrary Loan

The District joined MelCat in January 2006. As long as it is State Funded the District will continue this popular service. Headquarters staff will continue to do all DCB work associated with MelCat. The District provides delivery supplies for MelCat borrowed and loaned materials sent through Mel Delivery.
The District participates in interloan through White Pine Library Cooperative using the OCLC WorldCat System via White Pine Library Cooperative (called PEABODY). The District does not interloan music CDs or Movies through the OCLC WorldCat System.

Where needed, the District will continue to utilize ALA requesting for those items not available through VLC, MelCat and OCLC.

Rotation of Materials to Branch Libraries

Plan to review the rotation of materials procedures and schedule to branches in 2014. Discuss the need to continue to rotate materials with branch library staff. There also may be the need to survey library borrowers.

"Rainy Day" Funds

Maintain an undesignated fund balance of at least 27% each year.

Allow for $5,000 to be placed in reserve each year (2014, 2015, and 2016) for Penal Fine Recovery in the event that fines decrease in a given year. Despite the revenue increase from the new millage, we are still dependent on penal fines. Penal fines will still

account for approximately 27% of the new income we receive each year.

Maintain a Technology Fund balance of at least $130,000 for 2014.

Maintain a Building Fund balance of at least $100,000 for 2014. Maintain a MERIT Internet Fund balance of at least $60,000 for 2014.

Mary Johnston Memorial Library
In May 2007 the District increased Public Hours at the Mary Johnston Memorial Library to 40 hours per week. Four part-time employees are on the payroll for a total FTE of 2.4.

Maintain a Mary Johnston Memorial Library Fund balance of at least $12,000 for 2014.

Develop a plan to staff the Mary Johnston Memorial Library in preparation for the potential retirement of Hilde Carruthers.

Branch Library Staff and Substitutes
Allow for a stipend to be paid to library branch managers for staff meetings and continuing education. The stipend will increase to $9.26 per hour effective the first full payroll in January, 2014.

Raise the wage of substitutes to $9.06 per hour effective the first full payroll in January, 2014. Recruit and train more substitutes as needed. Substitute allowances for leave other than District supported meetings or District approved classes will remain under current policy of four times (4x) the number of hours open or hours worked by library branch managers, whichever is less (but not to exceed 40 hours). Substitutes will remain on the District Payroll.

Pay for all library branch managers who wish to attend the Rural Library Conference. Pay for fees, mileage, lodging, stipends and substitutes.

Pay for selected Continuing Education for library branch managers. Plan at least three programs each year for branch library staff education (marketing/public relations, customer service, and technology).

Invite branch library managers to annually spend a day at Administrative headquarters to observe District Headquarters staff at work. Pay mileage and the stipend amount for their attendance and travel time.

Review, annually, the document entitled "Branch Library Manager (Branch Librarian) Expectations of the Iosco-Arenac District Library". Include input from the library managers and their units of government.

Public Relations
Continue to prepare and present a full-color Annual Report highlighting budget, library information, new goals and highlights. Print and distribute at least 250 copies annually.

Plan for at least 2% of the penal fine income, each year, to be used for awareness advertising for the library (PR). For year 2014, this is estimated at $6,500.

Continue to explore opportunities for increased online presence. In 2010 the District opened and currently maintains a Facebook account. The District has taken advantage of YouTube and other Social Media opportunities will be explored.

Continue to update and enhance **www.ioscoarenaclibrary.org** (the District website), including encouraging links to our website by other organizations.

Revise and publish by November 2015, a new brochure of library services. The brochure will be available at all library branches, be given to every new library borrower, be distributed to every unit of government, and a copy sent to every school system in the two counties.

Join the Chambers of Commerce in AuSable/Oscoda, Tawas/East Tawas, AuGres and Standish and inquire about involvement and representation with the Hale Area Association.

Increase public speaking to service groups, government units, business organizations, and schools about library services. Attend at least one City Council/Township Board meeting for each of the government units operating branch libraries and report on the state of the District Library.

Continue involvement in Develop Iosco (Formerly Iosco County Economic Development Forum), and other Community organizations. Explore possible involvement in Arenac County organizations.

Continue outreach book drops to senior living facilities and the Standish Hospital. Explore other outreach in partnership with clubs and organizations.

Explore the possibility of programs twice a year at COA Senior Citizen Centers that include identifying services offered by the District and some form of entertainment or lifelong learning event.

Participate in parades utilizing the District vehicle and banners.

Explore a possible tour of District Library branches for the public and government representatives.

Support the existing Friends of the Library groups and encourage the formation of Friends Groups for all of the branch libraries. Continue to have District staff attend and participate in at least half of all Friends meetings.

Develop, distribute, collect data and report on Borrower Needs via a survey to be published in local newspapers, printed for handout at library branches, and via the District website and the District Facebook page. Survey the public in the Fall of 2014. Consider focus surveys of government officials, educators, clubs and organizations.

Continue to support and use the **Libraries? YES!** "brand" approved by the Board of Trustees in 2004.

Encourage and support the advocacy efforts of branch library staff, Board of Trustee members, government officials, Friends of the Library members, and administrative headquarters staff.

Programming
Increase the budget for Children's and Teen programs and services to $20,000 for 2014, $21,000 for 2015, and $22,000 for 2016, to allow for additional professional entertainers/educators and/or author visits.

Recognize that senior citizens make up an increasingly larger percentage of the population. Develop and support at least five programs each year targeted to older adults.

Provide funding to support programs targeted to adults that are sponsored by branch libraries, their Friends organizations and/or their units of government. The program funds will be spent by the

District if not used by the branch libraries. For 2014, the Adult program budget is $18,000, which includes a budget for District sponsored programs coordinated by the Community Liaison Librarian.

Explore the establishment of an annual District sponsored author program with a major author visit.

Explore a partnership with the Saginaw Chippewa Indian Tribe of Michigan to present an annual program on Native American culture.

Conduct at least one Open House at each branch library every year inviting the public to come in for demonstrations of the automation system and tours of the library. When possible tie the Open House to a local event to encourage participation. Also consider the use of "door prizes" and refreshments to encourage attendance.

Explore partnering with local theatre groups to provide partial funding for programming at special library events.

Continue to seek donations/grants for programs for all ages. Assist branch library managers and their units of government with grant application review and letters of support for their efforts.

Administrative Headquarters Staff
Annually review the District's Personnel Policy and wages and benefits structure.

Explore cost cutting on benefits, annually, without cutting benefits to Headquarters staff unless a "replacement benefit" can be substituted.

Encourage and support cross training opportunities determined by the District Director.

Annually review workloads and schedules to determine any need for additional staff.

Pay for selected Continuing Education for Administrative Headquarters employees.

Continue exploring plans for recruitment and retention of administrative headquarters staff. These plans are in response to an aging workforce nearing retirement age.

Explore the possibility of an outreach program where each District Headquarters staff person spends a day working with a branch librarian. The branch librarian and District Director will determine the tasks the District Headquarters staff person will do at the branch library.

Trustees
Actively encourage trustees to take advantage of opportunities such as the Michigan Library Association Annual Conference and the Rural Libraries Conference and similar training in order to keep abreast of changes in the library world.

Trustees will visit multiple branches each year and engage in dialogue with branch library staff for suggestions, comments and concerns about services provided by the District.

The District will pay for selected continuing education of trustees.

Actively encourage trustees to continue to advocate for District Libraries by volunteering for Library projects, attending Library programs, and speaking to individuals and groups about the importance of libraries.

Additional Sources of Revenue

Explore creation of an endowed fund for the District using undesignated Gifts and Memorials (non-public funding). The District cannot use public funds, including (but not limited to) millage, State Aid or penal fines for Foundation income.

Grants will be applied for including Corporate Grants (if an endowment fund is developed within the County Foundations), arts and culture grants, technology funding (Federal/State/Foundation), Saginaw Chippewa Indian 2%, and possible Capital improvement (Federal/State).

State Aid has been reduced. Explore ways to be less dependent on State Aid.

Other

The mileage rate for travel will be the rate allowed by the IRS. For 2013 the rate is $.565 per mile.

Budget to allow for a half-day "retreat" where Board members, employees of the District, and Branch Library staff meet and share ideas and concerns. Schedule the "retreat" to occur during the month of September 2014. Publish the agenda for the "retreat" prior to the meeting, contract with a facilitator, and allow for a second meeting if needed.

Explore an annual Furnishings and Decor Fund for each branch library. This may include contracting with library interior designers/space planners. Funding would come from Penal Fine revenues. A Board Committee would determine the list of allowances based on the "wish lists" of the units of government, the branch librarian and the District Director.

Establish a budget in 2014 for the purpose of renovating District Administrative office space. Renovations could include carpet,

lighting, paint, technology, electrical and window treatment needs spread over a three to five-year time period. All renovations would require approval from the City of East Tawas, and some costs may be shared with the City of East Tawas or be paid for by the City as part of the lease agreement.

Support the efforts of the City of East Tawas to build (or adapt another location for) a new library. Continue to participate on the East Tawas Library Planning Committee as an appointee of the East Tawas City Council.

Consider an incentive program rewarding those branch libraries open to the public on Saturdays for more than three hours AND evenings past 6:00 pm.

Consider an annual commitment to partially fund digitization projects undertaken by the Huron Shores Genealogy Society and the Arenac County Historical Society. The finished product must include access by the public but will be limited to in-house use at District branch library sites.

Partner with one or more branch libraries to establish and maintain a Business Outreach Resource collection. Consider the possibility of a dedicated computer devoted to business research. Involve MIWORKS! And other economic development groups in the planning.

Approved by the Iosco-Arenac District Library Board of Trustees at their Regular Meeting of January _____.