In 2016, under the guidance of the Charlevoix Public Library’s strategic planning committee, the Library began strategic planning for years 2017 – 2022. Library consultants Kimberly Bolan and Associates, LLC facilitated the process.

The Process

The Charlevoix Public Library’s strategic planning process included the following key areas.

1) Gathering community input and data, which involved showing Charlevoix staff and residents (both users and non-users) the possibilities for the Library as a thriving 21st century library, and then gathering their input and ideas. In addition, benchmark, demographic, and collection analyses were completed.

2) Developing solutions by compiling all gathered data and input and then working with the planning team during a Strategic Retreat to establish key strategic areas, specific goals, and related investments required to implement the goals to help the Library thrive over the next three years and beyond.

3) Providing a path to results by creating a plan that the Library staff and board can live, breathe, and readily implement on a day-to-day basis.

Stakeholder sessions were conducted for the Charlevoix Public Library. Focus group participants included the general public, parents, educators, boomers and seniors, the business community, Friends of the Library, teens, staff members, and trustees. Participants included frequent library users as well as infrequent and non-users and ranged in ages and backgrounds. Overall, 103 stakeholders participated in the discussions regarding the Library’s facility, services, and strategic future. In addition to the stakeholder sessions, an online survey was conducted. 150 surveys were completed. Survey participants included a mix of library users, infrequent users and non-users, with 90% being regular users (i.e., using the library multiple times a month or more) and the remainder being infrequent to non-users. Survey takers ranged from 13 to over 75 years of age. 65% were 55 years of age or older.

What We Heard

The community focus groups and online survey explored several topics including customer service, programming, outreach, marketing, technology, collections, and overall physical library space. Detailed summaries of all focus group and stakeholder feedback were provided to the Library’s leadership. All stakeholder input, data analysis, and follow-up exploration work fed into the Strategic Retreat, which included 23 stakeholders. This group synthesized all of the data and input into the key strategic foci, goals, and investments outlined on pages 2 and 3 of this document.

Evaluation & Collaboration

With the goal of achieving all outlined goals over the next three years, administration, staff, and the board of trustees will regularly evaluate their progress and achievements. Objectives set forth in this plan will be accomplished as outlined and will be reviewed on quarterly basis at the Library’s board meetings. This balanced and systematic process places emphasis on the resulting plan being iterative as well as substantially evolving over the next several years. A more detailed work plan has been created by the team in order to best carry out and assess the strategies set forth in this document.

The keys to Charlevoix Public Library’s implementation, evaluation and, ultimately, the success of its strategic plan will be:

- A thorough understanding of the plan as well as active involvement in implementing the plan by staff and the board of trustees
- Frequent and ongoing communication between administration and staff
- Frequent and ongoing communication between Library staff and the public
- Active collaboration between the Library’s board of trustees, administration, staff, outside organizations, and the community

Strategic Plan for 2017-2021

Adopted by the Charlevoix Public Library Board of Trustees on 1/12/2017
<table>
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<tr>
<th>Strategic Focus</th>
<th>Goal</th>
<th>Investments</th>
<th>Outcome</th>
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| Outreach and Community Engagement| To be Charlevoix's "Community Connector" and seen by the residents as the concierge to the city and its rich activities, history, and culture. | • Increase commitment and resources to actively engage schools and non-profit organizations, focusing not only on what the Library has for them, but how the Library can help them  
• Improve outreach and connections with local business, making concerted efforts to raise resource awareness within this sector of the community and engaging the community in what else the Library can do to help them  
• Experiment with the School Bus - Wi-Fi project idea, exploring whether this program can better serve and engage a captive audience of teens and youth. | The Library is THE place Charlevoix residents and visitors turn to for answers and community insight and happenings |
| Admired Customer Service         | To be a regional and national leader in effective, efficient, and personalized customer service that keeps users raving and supports the high value perception of the Library by the community | • Evaluate and explore what more can be done to make the Library as easy and as friendly to use as possible (hours, processes, procedures, and policies).  
• Continue fostering a staff and volunteer culture that not only values, but constantly holds true to the best practices in customer service.  
• Improve the web and mobile experiences, focusing on how to make the Library's digital experiences easy, engaging, and effective  
• Keep the Library's technological resources up to date and relevant to user and community needs  
• Explore ways to re-allocate/re-purpose low-use spaces within the building to address evolving space needs | Happy and engaged users who feel well-served by staff on a personal level |
| Highly Relevant Resources and Materials | To purchase and provide highly used and easy-to-access resources that are consistently evaluated by staff using data to improve acquisitions and best meet Charlevoix's needs | • Increase the amount and frequency of collection analysis (e.g., turnover, trends, digital and physical usage patterns, etc.) to determine purchasing priorities  
• Explore and expand collection merchandising strategies for both physical and digital resources  
• Increase the collections marketing emphasis and awareness related to digital resources  
• Develop a friendly digital interactive experience representing the rich history and uniqueness of Charlevoix | A collection of resources that are appreciated as well as highly used and accessed by a broader portion of the community |

### Strategic Plan for 2017-2021

Our Vision:
Be the educational and cultural anchor for the Charlevoix community.

Our Mission:
Connect the community to resources that educate, enrich and empower
<table>
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</table>
| **Effective Community Awareness / Marketing** | To deploy a more strategic approach to marketing that further improves community awareness and perception of services to users and non-users | • Develop a strategic marketing plan for the library  
• Update the website focused on ease of use and supporting the library’s brand and community image.  
• Evaluate new avenues and ideas for reaching users and non-users alike | A community that not only appreciates the specialness of CPL, but is also more aware of the new and evolving resources available to them |
| **Vibrant and Engaging Youth Services (0-18)** | To please the typical Library family as well as continue to draw in and serve youth and families who aren’t currently using Library services | • Further build a culture within youth staff of "engagement" verses "containment," fostering creativity, not just consumption as well as a mindset of looking outward and looking beyond who the Library currently serves  
• Partner with local groups and organizations who have an adjacent or shared mission with the Library relative to youth  
• Experiment with re-launching a Teen/Tween advisory group focusing on building an engaged culture of youth that ideally represents the diverse personalities and needs of the youth within the community  
• Continue to evaluate and evolve youth spaces within the Library, with the understanding that these areas will require frequent updating to remain engaging and relevant to young users  
• Emphasize programming that engages Teens/Tweens | Youth who are actively engaged in using the Library, expanding their knowledge and literacy skills across both physical and digital realms |
| **Exceptional Programming** | To offer programs that are vibrant, engaging, and reach frequent users as well as community members who might not use the Library | • Continue to foster a culture of experimentation in regard to programming at the Library  
• Experimentally develop and grow Maker and STEAM programming with the understanding that success may eventually lead to creating dedicated space for these services  
• Continue to evolve the role of the Library as “the place” for technology education/literacy and experimentation | A diverse, comprehensive, and valued slate of programs and activities that raise the bar for lifelong learning and user engagement |