

A Strategic Plan for the Wellesley Free Library 2009-2013

Introduction

The Wellesley Free Library consists of the Main Library at 530 Washington Street, and two branch libraries: the Hills Branch and the Fells Branch. The new Main Library opened in 2003, and while it is impossible to quantify the benefit of the new library to the Town, by every measure it is thriving. Five years after opening, circulation has increased 34%, yearly visits to the library now total over 400,000, and the website was visited close to 300,000 times last year. After being closed for two years due to a failed override vote, the two branch libraries were re-opened in 2008 after a successful campaign to raise operating funds for the next five years. With this effort, we are truly breaking new ground because the branches are now operated exclusively with private funds.

The WFL aspires to be an extraordinary community library containing relevant collections and state-of-the-art technology. A vibrant public-private partnership continues to fund, maintain, and grow the institution as a truly outstanding facility. With the understanding that the Town of Wellesley will fund the Library to the standard of a superior community library, the Library's Trustees and supporting organizations are committed to raising private funds that will be used to enhance the institution and its various programs.

Purpose of the Strategic Plan:

With the new Main Library celebrating its 5th anniversary, the branches re-opening, and the WFL Foundation becoming a reality, the time was right to initiate the Library's first strategic planning process. The committee, which included representatives from each of the library's major stakeholders, began its work in the spring of 2008.

The purpose of the strategic plan is to help the Library fulfill its mission and vision. By identifying the Library's institutional priorities and creating a roadmap for its direction over the next five years, the plan provides guidance that will allow and encourage our all of our stakeholders to work together toward common goals.

The Library's strategy is not fixed, however. For the plan to be effective it must be monitored and revised to reflect both the institution's evolution and the community's changing needs. Library staff and Trustees should be prepared to react to opportunities and adjust the strategy to best meet the goals of our mission and vision.

About the Planning Process:

The process used for the Wellesley Free Library's new Strategic Plan was extensive. It included two visioning sessions by the Trustees, research by the committee, three surveys, six focus groups, and a SWOT analysis.

The Strategic Planning Committee included representatives from all of the Library's major stakeholders: the Library Trustees, the Library Director; a Reference Librarian, the former

President of the Friends of the WFL, a Centennial Fund Trustee; and the President of the WFL Foundation.

Each committee member was responsible for one or more areas of research. Topics included the Library's funding needs, the collection, programs, the children's room, volunteers, the branch libraries, technology, community outreach and collaborations, and the Wellesley public school system.

Surveys included a public survey of the community, a staff survey, and a survey of Library Directors. The six focus groups were organized as follows: one for high school students, one for parents of young children, one for senior citizens, and three sessions that had a varied mix of participants. These focus groups were led by a consultant from Nelinet.

In December 2008, the Strategic Planning Committee held a SWOT analysis to assess the Library's strengths, weaknesses, opportunities, and threats. This analysis, along with data from the surveys, focus groups, and research projects, helped the committee to identify the institutional priorities that are outlined below.

Mission:

In the early stages of the strategic planning process, it became clear that the Library's mission statement needed to be re-written. After many months of work, the Trustees adopted a new mission statement on September 8, 2008:

“The mission of the Wellesley Free Library is to serve as a community gathering place, a cultural destination, and a gateway to ideas for residents of all ages and interests. Through books, media, technology, and innovative programs, the Wellesley Free Library provides free and convenient access to information both within and beyond our walls.”

Vision:

The Library's new vision statement was also part of the strategic planning process. The Trustees participated in two visioning sessions, and on September 8, 2008, they adopted the following:

“The vision of the Wellesley Free Library is to become the cultural, intellectual, and virtual crossroads of the community, to provide exceptional library services, and to be a leader among public libraries.”

Values:

The Trustees also created a new Statement of Values. The board adopted these on February 2, 2009:

At the Wellesley Free Library we value...

Our Patrons...we strive to deliver our services in a welcoming and responsive manner.

Our Employees...their myriad contributions make the Library a superior institution.

Our Supporting Organizations...their generous gifts provide enhancements that enrich the experience of every Library patron.

Excellence...we encourage Staff, Trustees and Volunteers to be creative, innovative, and strive for excellence.

The shared responsibility...of Staff, Trustees and Volunteers who are all essential participants in fulfilling our mission.

The needs of the community...which drive our services and collections.

A sense of community and fellowship... by ensuring that the Library is a gathering place that supports collaborative enquiry and enrichment through programs and offerings for all ages.

An informed and literate citizenry ... we actively promote our services, programs and the use of our collections to foster access to information, a critical role in a democratic society.

Collaboration...with other Town organizations and institutions.

Intellectual freedom...we promote and defend intellectual freedom and we acquire materials that represent the widest diversity of views and expressions.

Ethical and fiscally responsible stewardship...of all public and private resources.

Climate Assessment:

During our yearlong planning process, the United States economy underwent a dramatic change. The stock market fell more than 50%, and each day has brought startling revelations about the state of the banking system, the health of major corporations, and the overall contraction of the economy. Unemployment has been rising steadily, with the national unemployment rate hovering around 7% and Massachusetts' unemployment rate around 6%. These job losses have not only been in manufacturing (as in other recent

recessions) but have been in the financial sector also. In addition, foreclosure rates are at historic levels with an estimated ten million homeowners at risk. These factors have put tremendous downward pressure on home values and new construction in addition to decreasing consumer confidence. The federal government has given substantial support to the banking system and passed an \$800 billion stimulus package to shore up the economy.

Impact of the Economic Downturn: The immediate effect will be intense pressure on the Town's budget. As a result, the Library's budget may stay flat or even shrink. At the same time, the Library's services are more necessary than ever. In a tough economy, residents are increasingly turning to the WFL for books, DVDs, research materials, databases, programs, and services. Many people are using the Library as a primary source to search for jobs. The Library's already robust circulation has increased markedly over the past few months, and we expect this upward trend to continue for the foreseeable future.

New High School Project: In December 2008, the residents of Wellesley voted to approve the construction of a new High School. This project, slated to begin in September 2010, will take four years to complete. The Town expects to receive a \$44 million grant from the state to help fund the \$130.6 million project. The balance of the cost will be borne by the Town. During the construction phase, the WFL will be an important partner to the High School to provide library services that may be unavailable or severely limited at the school library. We believe that the Library's pro-active outreach to the High School throughout this project will demonstrate that the WFL is an important and essential partner to the school system.

New Senior Center: The Town is also studying the possibility of building a stand-alone Senior Center with programs for and outreach to Town citizens 60+ years of age. The genesis of the project is a bequest of \$825,000, which has been offered to the Town with the stipulation that the funds be used for construction of a facility for senior citizens. Current plans call for constructing a new building on already secured property at 496 Washington Street. The current total cost estimate is \$5.8 million dollars. As it presently stands, the bequest funds would reduce the Town portion of the cost to approximately \$5 million. Town boards have been generally supportive of this project and the 2009 Annual Town Meeting approved design funds for the building as the next step. It is anticipated that the full project will be brought to Town Meeting for approval in spring 2010. The WFL remains committed to supporting the 60+ segment of the Wellesley community and the location of the proposed building, which is just down the street from the Library, makes it perfect for collaboration.

It should be noted that these two projects are examples of town-wide plans that, while offering excellent opportunities to foster collaboration with the WFL, are also potential prospects for fund raising within the Wellesley community. Groups supporting these projects may join others locally (e.g. Temple Beth Elohim) in seeking to raise funds to help defray the cost of or to enhance their projects. Depending on the breadth and depth of the campaigns, the WFL could be in direct competition for this local support.

Impact on Philanthropy: Many non-profits experienced huge losses to their endowments in this downturn, which is likely to increase pressure on annual fund campaigns. At the same time, donors are cautious in the current climate. Although Americans are known for their generosity to charitable organizations, the recession means that donors may give less money

to fewer organizations. Cultivation and stewardship of donors and frequent communications with all constituents will be even more important in the immediate future.

The current economic environment could also impact the collection of pledges to the Branch Campaign, which was concluded on June 30, 2008. Even in better times, the industry-wide default rate for campaign pledges is 8-10%. Support for the branches, both through the Annual Campaign and by building endowment funds through the WFL Foundation, will be important elements of future fundraising efforts.

The loss of wealth experienced by many individuals will make fundraising very challenging in the near-term. Since there are no clear indicators for the end of the current recession, it is possible that fundraising may be difficult for several years to come.

We can take some comfort from the fact that the non-profits that have fared the best during recessionary periods have been human service organizations and those of public-society benefit. In a challenging economic environment, public libraries are more relevant than ever. Numerous articles in the national media in recent months, including *The Wall Street Journal* and *The New York Times*, have emphasized the importance of libraries. The WFL has a significant opportunity to highlight its collections, programs, and services at a time when residents need them most. Excellent library services are essential to the quality of life in Wellesley, and it is critical that we communicate this message to both our present and future donors.

Key Challenges to the Wellesley Free Library:

- Providing consistent delivery of excellent customer service
- Educating the community about the Library and its services
- Growing the collection strategically and thoughtfully in response to rapidly changing formats
- Reaching out to specific constituent groups, especially families with young children, teenagers, and Senior Citizens
- Expanding and cultivating a changing donor base
- Increasing private funding in a difficult economic environment
- Competing for donors and volunteers from many other worthy organizations in Wellesley, Boston, and the surrounding towns

Key Themes of Strategic Planning:

Since the core purpose of strategic planning is to help the Library live its mission and aspire to its vision, these key phrases have served as the foundation for our work in the planning process:

To be a Community Gathering Place

To be a Cultural Destination for the Town of Wellesley

...and to be the cultural crossroads of the community

To be a Gateway to Ideas for Residents of all Ages and Interests

...and to be the intellectual crossroads of the community

To provide free and convenient access to information both within and beyond our walls

...and to be the virtual crossroads of our community

To provide exceptional Library Services

To be a leader among Public Libraries

THE MAJOR INITIATIVES OF THE STRATEGIC PLAN

To be a Community Gathering Place: To ensure that our buildings and programs are meeting the needs of the Wellesley community

KEY OBJECTIVES:

*** Continue to assess the capital needs of library buildings and ensure superior maintenance**

*** Adapt the Children's Room to better meet the diverse needs of the full range of ages that use the room**

--Hire an additional Children's Librarian

--Create welcoming spaces that encourage reading and learning

--Distribute and incorporate the Children's Department Statement of Purpose, which was adopted by the Library Trustees on February 2, 2009:

The Children's Room provides a welcoming and enjoyable space for children, parents, caregivers, and teachers working with children. We offer a wide variety of materials for children through age 13, reference assistance, and ongoing programs and special events for children and families. The Children's Room provides an inviting and nurturing environment for study, reading, and quiet play. Our goal is to make the WFL a significant and beneficial part of children's lives.

*** Increase use of the Branch libraries to complement the services provided by the Main Library**

--The branch libraries offer current and popular collections, meeting space, and programs to meet the community's needs and facilitate access to the broader collection and services offered at the Main Library

-- Use branches to support elementary school research areas including Egypt, states, insects, Russia, China, and other areas of the curriculum using signs, books, displays, and programs.

*** Increase space for middle school and high school students:**

--Create a meeting space/study room for teenagers

--Hire a Young Adult Librarian to oversee and guide both the collections and program needs for this age group

--Programs could include a summer reading program, a homework helpline, and/or a video gaming competition

*** Evaluate current and future space needs and develop plans to meet them**

**To be a Cultural Destination for the Town of Wellesley:
...and to be the cultural crossroads of the community**

KEY OBJECTIVES

- * Anticipate and meet the educational and cultural needs of the community through Library programs, events, and activities**
 - Maintain broad cultural programming to celebrate the diverse interests of Wellesley residents
 - Author visits, lectures, musical performances, poetry readings, art exhibits, and children's programs are examples of our extensive offerings
 - Create a signature annual event, such as One Book/One Town or a Storytelling Weekend, to engage residents and build community

- *Remain dedicated to providing and supporting lifelong learning**

**To be a Gateway to Ideas for Residents of all Ages and Interests:
...and to be the intellectual crossroads of the community**

KEY OBJECTIVES

- * Support Senior Citizens**
 - Whether or not the Town builds a new senior center, the Library will continue to play an important and distinctive role in serving this population. We will use the library's facilities and programs to reach out to the 5,300 residents who are over 60.
 - Weekly bookmobile (in conjunction with Council on Aging bus) to senior meeting places to deliver and pick up books that were requested online

- * Reach out to the Wellesley Public Schools**
 - Work with the Wellesley Public School librarians and teachers to support the school curriculum on every level, from elementary school through high school
 - Create a research guide for the library

Elementary School Support

- Create library tour with library card for all second graders.
- Support elementary libraries through additional copies of their book/author of the month
- Recruit volunteers to visit the elementary schools as a reader or book character

High School and Middle School

- Consider 3pm-5pm as "Study hall" for children who come to the library after school
- Create "Junior Thesis research and Using the Library" seminar for high school students

- Integrate library into bus route for middle school and high school
- Serve as a resource for the high school during the upcoming WHS Building Project

*** Initiate contact with groups, such as the Newcomers Club and the Wellesley Mothers Forum, to introduce new residents to the services and programs available at the Library**

- Offer tours of the Library on a monthly basis
- Encourage new residents to get library cards

*** Reach out to local colleges and universities for access to collections, exhibits, online databases, and other services**

To provide free and convenient access to information both within and beyond our walls

...and to be the virtual crossroads of our community

KEY OBJECTIVES

*** Maximize public access to our collections and services**

- Raise public awareness of the staff's expertise and accessibility
- Provide easy and efficient access for all residents through adaptive technology and a variety of formats and services
- Continue to expand the Library's online presence through the website

*** Invest in technology to improve access to Library collections and resources**

- Expand the reach of our website: provide more links to the WFL and provide more information on the website
- Increase online resources, particularly online databases
- Continue to invest appropriately in digital content and evaluate emerging formats while maintaining superior print and media collections

*** Aspire to be a "library without walls" with access 24/7**

- Promote use of online services for routine library needs

*** Renew and revitalize the Library's Collection Development Plan**

To provide exceptional Library Services:

KEY OBJECTIVES

- *Aspire to the highest standards of customer service**
 - Fully engage library staff in pursuing and implementing “best practices”
 - Facilitate and promote opportunities for user input and participation
 - Provide customer service training to staff that interface with the public
 - Install RFID to more efficiently manage the collection and free staff members for direct customer service

- * Support the library staff, one of the library’s most valuable assets**
 - Provide the resources needed to insure top quality and efficient service
 - Provide professional development opportunities
 - Recognize and support the work of individual staff members

- * Engage more volunteers by expanding volunteer opportunities at the WFL**
 - Recruit high-level volunteers to promote the library and to provide expertise in a variety of areas

To be a leader among Public Libraries:

KEY OBJECTIVES

- * Ensure the long-term financial security and integrity of the Library’s core assets and activities**
 - Strengthen town-wide support to ensure that public funds are available to maintain core functions, an efficient physical plant, optimal staff, quality collections, and state-of-the-art technology
 - Inform the Selectmen, Advisory Board, Town Meeting Members, other Town officials, and the community at large about Library performance criteria and its cost effective delivery of service

- *Develop and expand our Public-Private Partnership**
 - Continue to grow the Development Program
 - Grow the Library’s Annual Campaign
 - Establish an endowment through the WFL Foundation to provide long-term funds for the enhancement and financial stability of the institution
 - Continue to creatively leverage the space in the branch libraries to increase the revenue stream

- * Encourage public awareness of library services**
 - Update and advance the Marketing Plan approved by the Trustees in 2006

*** Pursue opportunities to learn “best practices” in library services and development, especially from peer and aspirant organizations**

- Ensure a service model of constant and purposeful adaptation to evolving needs and interests of users
- Foster an environment that encourages new ideas and innovation, and flexibility to respond to opportunities

*** Engage Trustees to further define what this means in the context of our Vision Statement**

- Define comparative benchmarks with peer institutions

Conclusion:

The Wellesley Free Library is an excellent, well-run, and highly professional institution. It has outstanding buildings, collections, and programs. The planning committee objectively studied the Library’s strengths and challenges through independent market research as well as anecdotal evidence. Its purpose is to help build upon these strengths while also addressing the areas for growth, expansion, and improvement.

Despite the efforts that went into this plan, however, it is important to recognize that **the Library must be both STRATEGIC and OPPORTUNISTIC** about its future success. A strategic plan is meant to provide direction, but it isn’t “written in stone.” If a wonderful opportunity presents itself, the critical question is not “does it fit into our strategic plan?” but: “does it fit with our mission, vision, and values?”

Wellesley Free Library Planning Committee:

Carolyn Wood, Director of Development, Chair
Janice Coduri, Library Director
Sue Hamilos, Reference Librarian
Ann Howley, Library Trustee
Ann-Mara Lanza, Library Trustee
Norma O’Reilly, Centennial Fund Trustee
Pam Stirrat, Past President, Friends of the WFL
Andy Wrobel, President of the WFL Foundation