

The Wellesley Free Library Strategic Plan 2014-2018

INTRODUCTION

One of Wellesley's cornerstones, The Wellesley Free Library (WFL) consists of a Main Library, located centrally in the Town square, and two branches (the Wellesley Hills and Fells Branches), located in at the east and west end of town. In addition, the Library hosts a very robust website that is a "virtual branch" of the Library.

Wellesley's population is, on average, highly educated and economically affluent, with high expectations for their Town's library. All of our facilities strive to meet the needs of the townspeople of Wellesley first and foremost. Based on statistics of use and results of survey and focus groups, the Wellesley Free Library succeeds in its mission "to serve as a community gathering place, a cultural destination and a gateway to ideas for residents of all ages." Townspeople see the Library as the "heart of the community": an entity that serves their needs with relevant collections; state-of-the-art technology; relevant and entertaining programs; artistic displays; and up-to the minute access of information through the website.

While the WFL is very proud of its past success, we do not intend to become complacent or stagnant. The goal of the WFL for the next five years is to maintain the high levels of offerings to which our patrons have become accustomed. By taking a *proactive, affirmative approach to innovation*, the WFL will strive to stay at the forefront of the library field, providing exceptional programs and services to our community.

Purpose of the Strategic Plan

As the WFL moves into the 21st century, the need for careful planning in order to stay relevant to our customers is stronger than ever before. Rapidly changing technology, new materials formats, shrinking budgets, nurturing public-private partnerships, and addressing requests for more meeting space are among the many issues that will drive decisions over the next five years.

The long-time Director of the WFL is retiring. As we experience a change in leadership at the WFL, it is essential that we document our current state and clearly define the strategic priorities of the WFL Board of Trustees for the WFL.

This plan follows on the Strategic Plan for the Wellesley Free Library, 2009-2013.

BACKGROUND

Strategic Planning Process

The Strategic Planning Committee was formed in the summer of 2012. It consisted of representatives from the Library Trustees, Administration and Staff, and supporting organizations (Wellesley Free Library Foundation, The Friends of the Wellesley Free Library, The Centennial Fund). Committee work began with the distribution of relevant articles on long-range planning, articles on the future of libraries, and a timeline. Tasks were established and distributed among the members. The planning process for the WFL Strategic Plan 2014-2018 has been quite extensive. The goal of the Strategic Planning Committee was to create a comprehensive plan that will guide the Library through the next five years. The Committee reviewed and reaffirmed the Mission Statement and the Vision Statement of the WFL.

The WFL Strategic Planning Committee sought input from many constituencies. In September, 2012, four focus groups were held at the Library led by Facilitator Nancy Rea. Participants were self-selected by filling out sign-up sheets located in all branch locations. In addition, members of the Committee held a focus group for town meeting members. Committee members also interviewed several Administrators in other Town departments as well as several elected officials.

In the spring of 2012, as part of a *Service to Teens & Tweens* grant, Wellesley High School students were surveyed on their thought and comments about the Public Library. Additionally, a staff survey was completed in November, 2012, including questions that focused on feedback they receive from our patrons and also inviting their opinions on the role of the Library.

The Committee also developed a general patron survey which was made available through the WFL website with an invitation for all town residents to participate. This survey was available for the month of January, 2013.

The final step of the Committee was the completion of a SWOT analysis for the library in February, 2013 which took into consideration all of the data collected during the strategic planning process. The Library Trustees then discussed and prioritized the opportunities identified by the Committee during the SWOT.

Mission, Vision, and Values of the Wellesley Free Library

The Mission, Vision and Values of the Wellesley Free Library are the core of the library and drive all decisions, both strategic and operational. On September 8, 2008, the WFL Board of Trustees adopted the following Mission and Vision. The Values were adopted on February 2, 2009.

Mission:

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 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:

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

The Wellesley Free Library does not operate in a vacuum. When making decisions that impact library operations, it is imperative to consider what is going on in the community in which we function.

Massachusetts Economy

Five years ago, Massachusetts was in the midst of an economic downturn. As a direct result, library usage began to climb, with patrons taking increasing advantage of materials, Internet access, job-training programs, and other free services provided by libraries. At the same time, the economic difficulties also necessitated limits on tax-funded library budgets. These funding constraints continue today and are anticipated for the foreseeable future.

However, the Massachusetts economy has turned a corner. According to the New England Economic Partnership:

The Massachusetts economy is in the fourth year of the expansion that began in the summer of 2009. During this expansion, real gross state product has grown at 2.9% average annual rate, and payroll employment has grown at a 1.3% average annual rate. According to the payroll survey, payroll employment surpassed its pre-recession peak in January. Massachusetts has grown faster than the U.S. as a whole during this period.

In Wellesley, where the economic turnaround is evidenced by an uptick in housing sales, library services continue to be in high demand.

Town of Wellesley

The town of Wellesley is a small, bustling, and highly desirable place to live. With a population nearing 28,000, the town experienced a 5.1% increase in population from 2000 to 2010. As of 2010, the median age was 38.2 years, with over a quarter of the residents under age 18. Notably, individuals 65 and older constitute approximately 14% of the town's residents, a trend that is likely to grow and is mirrored at the State and national levels. Compared to the State, Wellesley ranks high or very high for median household incomes, median house values, and the cost of living index. The town boasts very high levels of educational attainment: Over 97% of residents have completed high school and nearly 76% hold a bachelor's degree or more. Forty-one percent of individuals here have a graduate or professional degree with the most common occupations found in professional, scientific, technical and financial fields. Finally, Wellesley is

the proud home to two private colleges totaling approximately 4,600 full-time students and a local community college with over 2,000 enrollees. These statistics provide an initial background of the nature of life in Wellesley and the demand, interests, and preferences of individuals using and seeking public services such as the Library.

There is significant development in Wellesley, either recently completed or under consideration.

Waterstone

Located at 27 Washington Street, Waterstone offers 82 Independent Living Apartments and 51 Assisted Living Apartments. The facility was recently completed and is the largest new residential development in Wellesley. Waterstone seeks to establish itself as an active member of the Town and management there feels that WFL programming is a natural resource for connecting Waterstone residents to our community. Waterstone will make its public space available for meetings.

900 Washington St. ("St. James" Site)

In 2011, Town Meeting approved the purchase of "St. James" site and voted to establish the 900 Worcester St. Planning Committee. However, no activity for the site can take place before a final appeal by the church congregation to the Vatican is resolved. In the meantime, the 900 Worcester St. Planning Committee has been researching possible uses of the site. The current plan is for recreational use including activities such as playing fields, a swimming pool, and hockey rink. Development is likely to be 2-10 years in the future. It is anticipated that costs for development will be partially funded through tax dollars (for playing field construction) and through private donations (the construction of a swimming pool and/or hockey rink).

The Tolles-Parsons Center

Planning has progressed on the concept of a "senior center" in Wellesley. Currently, designs are ongoing for a facility at the former VFW site located just east of the main library building. Parking would be both on-site and across Washington Street. Due to building and parking limitations, there is some discussion of a "hub and spoke" model of providing services to Wellesley's elders: for example, the Council on Aging (COA) would hold some programs on-site while additional programs sponsored by the COA would be offered at other locations, including the Warren Recreation building and the Wellesley Free Library. The WFL and COA, long informal collaborators, began a more formal partnership during the 2012-2013 program year by offering a series of evening and weekend lectures that allowed the COA to offer evening programs for the first time.

The timeframe for moving forward with construction of the Tolles-Parsons Center is unclear at this point. It is possible that private funding sources will be utilized.

Wellesley Public Schools

Wellesley prides itself on having an excellent school system, complete with a new, state of the art high school. The library in the new high school is located in the heart of the school building. It is actively used as a study space and has limited materials. The school library is unavailable after 3:15pm (end of the school day), making the WFL an important space and its resources highly valuable to high school students.

In the Fall of 2013, The Wellesley Public Schools (WPS) will roll out a program through which all 5th graders will have access to iPads for use in school. The WPS are eager to partner with the WFL to provide support and electronic materials for this platform. It is anticipated that the WPS will continue to shift to a more technology-based education model.

The WFL has a history of partnering with the WPS. The middle school and the high school provide the WFL with annual reading lists, allowing the WFL to keep the collection up to date for student use. To further support students, the WFL maintains a collection of textbooks and purchases specialized databases. The WFL also provides outreach visits to the elementary and middle schools and is a destination for students at all levels on “early release” school days.

School budget restrictions have continued to impact the ability of the school libraries to purchase new materials. Currently, the school libraries rely heavily on private funds raised by the PTOs and grants from the Wellesley Education Foundation (WEF).

Our Supporting Organizations

The WFL is extremely fortunate to be supported by three outstanding organizations.

The Wellesley Free Library Foundation

The Wellesley Free Library Foundation is a private, nonprofit foundation supporting and enhancing the mission of the WFL. Their goal is to enrich, not replace, traditional tax-based support for the WFL through gifts, grants, and bequests from individuals and organizations while reinforcing the need for continued and increased public support for the Library. The Foundation spearheads fundraising efforts to bridge the gap between the community’s aspirations for our Library and assets available from municipal sources. The Foundation ensures that Wellesley has sufficient financial resources to maintain a vibrant, modern library system that services the diverse needs of everyone in our

community. To date, the Foundation has supported, among other projects: branch library operations, an ESL program, a new high school study room, technology training, and outreach.

The Friends of the Wellesley Free Libraries

The Friends of the Wellesley Free Libraries are dedicated to enhancing the quality of the Library by providing services and programming not funded by the library budget. From museum passes and author lectures to quality programs for our youngest patrons, the Friends work hard to ensure that our Library maintains its excellent reputation and serves our community at the highest level. Quarterly book sales and memberships enable the Friends to serve the entire Wellesley community in a very meaningful way. Nearly 100% of the programming that the WFL provides to our patrons is funded through the generosity of the Friends.

The Centennial Fund

The Centennial Fund was founded in 1983 (on the Library's 100th birthday) as a permanent endowment to "enrich and enhance" the basic Town-funded materials collection. Since that time, the Fund has given approximately \$900,000, including 24% of the FY09 materials budget, to the Library. The Centennial Fund provides funds which allow the Library Director to experiment, and build collections that would otherwise not be possible; purchase exciting new databases; and showcase evolving materials formats. In addition, the Fund provides enhancement grants for collections whose usage has increased. The Fund has enabled the WFL to establish a legacy of the highest quality specialized reference materials, art and coffee-table books, foreign-language film DVDs, classical music CDs, and special editions. Most recently, the Centennial Fund supported the digitization of the Wellesley Townsman (Wellesley's local newspaper) from its inception through 1989.

Library Trends

The research of the committee identified seven overarching trends related to the future of libraries. These include:

1. The growth and diversity in librarian competencies, specifically, the need for future librarians to have greater capabilities as "digital media mentors"
2. The need for planned collaboration and consolidation of extant collections given the growth in digital media and increasing financial pressures
3. Digitization, or the rapid growth in multiple digital modalities

4. The importance of customer personalization and the use of social networking to reach out to patrons routinely
5. A trend towards archiving and cataloging locally important materials for in-library use with simultaneous access via the Internet
6. An emphasis on our economic value given that services and materials remain free to the public
7. The use of the library as a community-wide physical gathering space.

KEY CHALLENGES TO THE WELLESLEY FREE LIBRARY

Communicating effectively with our community. It is increasingly difficult to capture the attention of our patrons and potential patrons. Only a small subset of the community reads the local newspaper. Electronic communication (email, social media, etc.) is inexpensive but is easily lost in the multitude of competing messages. People are so busy that information is often desired only at the moment that it is needed.

Providing consistent delivery of an excellent customer experience during a time of rapid changes in the library industry. The evolution of technology impacts funding requirements and necessitates staff retraining. The way patrons obtain information and how they view content is very different today from 10 years ago. As technology changes, patron expectations of what a library should do change as well. Patrons now expect libraries to provide materials in multiple formats, including e-books, and to provide access to alternative technologies, such as Macs and iPads. At the same time, the publishing industry is undergoing a sea-change which directly impacts library services. Libraries must adapt to a changing distribution model, lack of clarity surrounding copyrights and fees for electronic material, and the unreliable quality of increasingly accessible self-published works.

Keeping our building design current to address the changing needs of our patrons. Since we built our main library building 10 years ago, library usage has evolved considerably. There is a greater need for group meetings and private work spaces. We have instituted an RFID self-check system that changes the space requirements of our circulation area. There is a much higher use of cell phones and laptops, and social norms regarding food consumption around books have changed significantly. We strive to meet the needs of Wellesley's students as the schools have moved towards more cooperative assignments and more technology-based learning models. To complicate these challenges, we have found that patrons have differing ideas about how libraries should be used today.

Continuing to provide exceptional library services in an uncertain funding environment. For many years, the Wellesley Free Library operated successfully under strict financial conditions as Town budget guidelines were issued at level or near level funding, compared to previous years. This has impacted our ability to hire additional staff to meet increasing library usage and changing patron needs. There is no indication that tax funded budgets will be able to increase substantially in the foreseeable future. The gap between "core services" (funded through tax dollars) and the services that make us the outstanding library that our community demands has been closed through increasing private donations. However, no matter how fortunate we are to have such wonderful patron support, there is an inherent risk on being dependent on private funding. There are many worthy causes and organizations that compete for the same donors.

Coping with success. The increase in usage which started with the economic downturn of 2008 has not subsided. Circulation increased almost 9% between FY11 and FY12. We have been able to meet this increase in demand by strategically using our two branch libraries, implementing RFID, and cultivating our fledging Wellesley Free Library Foundation. We are proud that we have been able to meet this increased demand, with little adverse impact on service. However, success puts a stress on both the buildings and programming of the WFL. On some days, it is consistently difficult for our patrons to find a place to park. Popular programs have been over-subscribed, causing us to turn away eager participants. If demand continues to increase without the matching budget gains, we run the risk of losing our ability to effectively serve our community.

Creating greater understanding of the strategic importance of Branch Libraries. In 2008, the Wellesley Hills Branch Library and the Fells Branch Library were reopened with much excitement. Since then, circulation at these two buildings has increased by 37%. In FY12 alone, the Branch Libraries serviced 15,332 visits, significantly relieving pressure on the main library building. While the buildings themselves are owned and maintained by the Town of Wellesley, 100% of the Branch operating budget is funded through private donations. Patrons who utilize the Branch Libraries are very satisfied with them and would like them to be open longer hours and provide “full-service” library offerings. However, segments of the community are not familiar with the funding model or the benefits that the library system and community enjoys from the operation of these two satellite locations. It is clear that communication related the Branch Libraries has been inadequate in terms of community education.

THE STRATEGY

Key Themes

In order to address the above challenges and in accordance with the mission of the WFL, the Trustees of the WFL have created the following guiding principle and have set forth the subsequent strategic goals.

Guiding Principle:

Take a proactive, affirmative approach to innovation.

Strategic Goals:

- I. Enhance usage of space within the library buildings to support the Library as a community gathering place and cultural destination
- II. Improve communications to promote free and convenient access
- III. Strengthen offerings to provide exceptional library services
- IV. Enrich partnerships to be a true gateway to ideas for all residents and an intellectual crossroads for the community
- V. Expand revenue streams to enable us to be a leader among public libraries

Strategic Initiatives

The following strategic initiatives support the WFL Strategic Goals outlined above. The Trustees have set the prioritized these initiatives. However, it is up to the Director of the WFL to determine the most effective timing for development and implementation of these initiatives. This action plan will be approved by the Trustees on an annual basis and subsequently submitted to the Massachusetts Board of Library Commissioners.

I. Enhance usage of space within the library buildings to support the library as a community gathering place and cultural destination

Key Initiatives:

High Priority

- Create more meeting space

Medium Priority

- Explore redesign of second floor to better meet patron needs
- Evaluate first floor space use for improved functionality
- Optimize use of facilities across all library buildings
- Research alternative models for food consumption in library

I. Enhance usage of space within the library buildings to support the library as a community gathering place and cultural destination (continued)

Low Priority

- Expand access through use of additional remote services

II. Improve communications to promote free and convenient access

Key Initiatives:

High Priority

- Develop a focused communication strategy to:
 - Strengthen the image of the WFL as a crossroads
 - Advance the library as a catalyst for new ideas/literature/concepts/"intellectual recreation"
 - Promote the unique value of the branches
- Use technology to increase awareness of all aspects of the WFL
- Promote the WFL through 10th anniversary activities
- Increase e-newsletter subscription list

Medium

- Enhance social media presence

III. Strengthen offerings to provide exceptional library services

Key Initiatives:

High

- Purchase new/more technology to meet patron needs
- Enhance teen space and offerings
- Formalize unique programs and services
- Refine role of branches and develop tailored offerings
- Create an innovation committee

Medium Priority

- Enhance services for older adults

IV. Enrich partnerships to be a true gateway to ideas for all residents and an intellectual crossroads for the community

Key Initiatives:

High Priority

- Build stronger relationships with schools
- Continue collaborative town-wide effort

Medium Priority

- Enhance outreach to support needs of empty-nesters, new residents, ESL, and colleges
- Engage younger supporters from Foundation Gala
- Explore increased coordination with other libraries to better utilize limited funds

V. Expand revenue streams to enable us to be a leader among public libraries

Key Initiatives:

High Priority

- Partner creatively with other town groups
- Develop more robust corporate outreach programs
- Actively nurture fundraising endeavors of our support organizations

Medium Priority

- Research alternative revenue generating services that improve the patron experience (e.g., ATM or café)

CONCLUSION

Consistent with the findings of the previous strategic plan, the Wellesley Free Library remains 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. The purpose of this strategic plan is to continue building on these strengths while also addressing areas and opportunities for growth, expansion, and improvement.

Despite the efforts that went into this plan, it is important to recognize that future success is contingent on the library being both **strategic** and **opportunistic** when evaluating specific initiatives. The strategic plan is meant to provide direction; it is not a path "written in stone." **If an unanticipated opportunity presents itself, the critical question is not "Does it fit into our strategic plan?" but, rather, "Does it fit with our mission, vision, and values?"**

Wellesley Free Library Strategic Planning Committee:

Ann-Mara Lanza, Library Trustee, Chair
Janice Coduri, Library Director
Jessica Wolfe, Library Trustee
Beth Sullivan Woods, Library Trustee
Sue Hamilos, Department Head, Reference
Farouqua Abuzeit, Department Head, Childrens
Alex Gavis, President of the WFL Foundation
Linda Permitter, Centennial Fund Trustee
Bridgett Bettigole, Friends of the WFL Board

APPENDIX: SWOT ANALYSIS

Strengths

- Serve ALL members of the community
- Innovative
- Excellent service
 - Consistent, high quality in all areas (programs, services, staff, materials)
 - Welcoming staff
 - High priority to customer service
 - Responsive to patrons
 - Knowledgeable staff
 - Source of expertise for community
- Beautiful buildings
- Comprehensive Offerings:
 - Print collection
 - Museum passes
 - Art gallery
 - Computer lab
 - Access to Minuteman
 - Programs – kids (Storytime!)
 - Programs – general
- Convenience
 - Free and open access to information
 - Open hours compared to neighboring libraries
 - Central location and satellite locations (proximity to shopping and homes)
- Good image
 - Viewed as the “heart of the community”
 - Viewed as a role model for the town: technology adoption, strategic planning, budgeting
 - People feel at home here
 - Patrons love the WFL
- Strong partnerships
 - Supporting organizations
 - Partnerships: Youth Commission, Council on Aging, Historical Society, Schools, other town organizations

Weaknesses

- Some offerings need enhancement
 - Teen programming
 - E-Books: Not meeting patron needs
 - Non-print collection
 - Toys in Children's Room: old, not enough
 - Not enough technology. No Macs.
- Never enough communication
 - Patrons don't know about services
 - Patrons don't understand how we are funded
- Building does not meet some current needs of patrons
 - Need more meeting space.
 - Front door – Awkward access. No crosswalk.
 - Limited locations to make phone calls.
 - Limited locations for eating snacks.
 - No coffee available. (Could this be managed?)
 - Book drops – Drive through drops are hard to use.
 - Not enough parking
 - Too much noise on 2nd floor
- Circulation staff – not always friendly and welcoming enough
- Lack of staff in some areas
 - Outreach
 - Reference/Info desk
 - Childrens/YA
 - Marketing/Communication
- Need to retrain staff on new technologies
- Branches could do more to serve community
 - Limited hours at Fells
 - Lack of full service at Branches

Opportunities

- Enhance Buildings
 - Reconfigure 2nd floor. Do we need as much space for stacks?
 - More space for meetings/rental
 - Basement at Hills Branch – Can we use it for anything? Book storage to allow more space at main?
 - Better facilities for food: possible revenue source, outside in the summer, tables in the lobby (no food with books)
 - ATM – Convenience for patrons, revenue source
 - Increase drop off/pick up locations: Roche Bros?
 - Leverage space for greater revenue
- Increase Communications
 - Increase e-news subscription list – all library card holders with “opt-out” option
 - Enhance social media presence
 - Use technology to increase awareness of all aspects of the WFL
 - Strengthen image as WFL as “Crossroads”
 - 10th Anniversary is a communication opportunity
 - Library as catalyst for new ideas/literature/concepts
 - Implement new tagline: “Intellectual Recreation”, a sense of purpose
- Strengthen Offerings
 - “Adults in second half of life” services – What should our role be in how the town delivers services? How do we fit in the “hub and spoke” model being considered?
 - Purchase new/more technology to meet patron needs
 - Enhance teen space and offerings
 - Customize branches to target audiences (YA at Hills?)
- Enrich Partnerships
 - Stronger relationship with schools: Work with new Superintendent; Support iPad and other school initiatives
 - Outreach – Community wide: Empty nesters, new residents, ELL, colleges
 - Corporate outreach program
 - Engage younger supporters from Foundation Gala
 - Active coordination (materials/programs) with other libraries to better utilize limited funds
 - Develop internship program with Simmons or other school
 - Current students/graduates are “digitally native”
 - Source of continued innovation

Threats

- Uncertain funding environment
 - Level funding from town
 - Need to raise private donations to provide materials/services that patrons expect
 - Increasing competition for private funds
- No control over funds for maintaining buildings/ uncertain support from BOS
- Keeping up with rapid change
 - Meeting escalating expectations of patrons
 - Keeping up with the changing technology – where do we find the money to buy all formats?
 - Rapid rate of change in how people get information and how people view content
 - Steep learning curve for staff
- Competition from partners for patrons/donors
- Managing success
 - Some programs are “too” successful – Risk of losing/unhappy patrons if we have to turn away or cannot handle demand well
 - Pressure on services from non-residents
 - Difficult to hire needed staff – not enough funding
- Changing publishing industry
 - Unreliable quality of self-published works
 - Changing distribution model
 - Unstable model for copywriting and fees for electronic material