BLACKSTONE LIBRARY
···1896···

JAMES BLACKSTONE MEMORIAL LIBRARY
STRATEGIC PLAN
2013 - 2015

December 6, 2012

CONTENTS

*The James Blackstone Memorial Library is… **more than books.***

As our economy has experienced the worst recession in recent history and changes in technology have catapulted the ability to access information, the Blackstone Library has continued to impact the lives of patrons by providing free access to information via computers, books, and other medias, a wide variety of programming, and a physical space that is truly an icon of the Branford community.

At the outset of the strategic planning process, the Strategic Planning Committee raised key questions that the process should address: *Due to the changing nature of technology, how do community members want to utilize the Library? What are the needs of our community and how can the Library address those needs? What are the characteristics of a 21st century Library? What changes should be undertaken to move in that direction?* To answer these questions, the committee, with support from Anne Yurasek of Fio Partners, undertook a robust information gathering process over five months that engaged over 600 members of the community and included individual interviews, focus groups, an online community survey, research, and internal analysis.[1]

The information gathered created a foundation to inform the development of the strategic plan. The plan acts as a framework for improving and changing the Library. It builds off of the previous strategic plan and the progress made in recent years. The plan will guide the Library's decision making in the next three years. The shorter planning cycle is due to the speed at which the environment is changing and will allow the Library to remain nimble and adjust strategies as new information may become available.

Using the planning framework[2], the Committee and the Board of Trustees developed the plan including for each element, an overarching goal, high level strategies, and suggested tactics. In addition, metrics were identified for the Board of Trustees and staff to monitor progress over time. The plan will act as the broad framework to support the prioritization of strategies and allocation and pursuit of resources to enact those strategies.

---
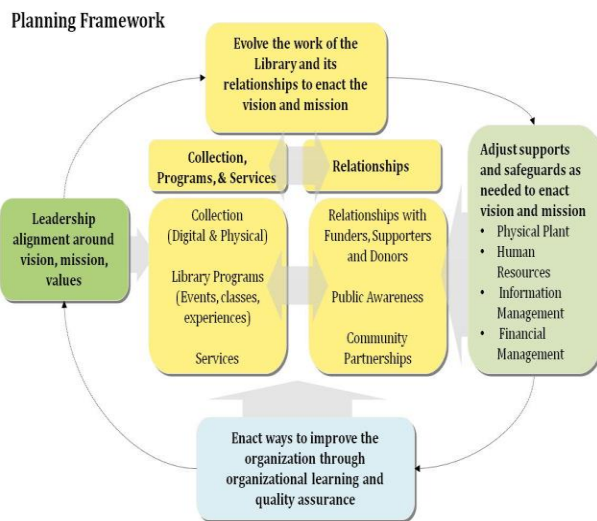
[1] The process is described in Appendix A.
[2] The planning framework is derived from the Nonprofit Strategic Management Framework developed by Fio Partners, LLC.

WHAT WE LEARNED: THEMES & TRENDS

The patterns in the information gathered were as follows:

- Evolution of technology
- Increasing and changing needs of the community
- Shifting view of physical space
- Library as an historical icon
- Power of human interaction and importance of community
- Organizational evolution in recent years

EVOLUTION OF TECHNOLOGY

With the emergence and continued proliferation of e-books, e-readers and tablets and availability of information on the Internet, users posed questions about the role of the Library in the digital age if the demand for physical books were to decline over time. The challenge with the increasing use of technology to access information is that not all community members are able to purchase or access the equipment to do so. It is clear that the Library must continue to play a role in providing not only access to the equipment but also provide training and guidance to those interested in utilizing these tools. Available free public computers, Wi-Fi access, and access to other digital tools, such as e-readers, scanners and possibly other digital media tools, will be important to the community into the future.

INCREASING AND CHANGING NEEDS OF THE COMMUNITY

The town of Branford is an evolving community. Many community members noted an increase in community needs due to the economic downturn and an increase in the number of English Language Learners who live in Branford. The needs of these families are complex and can include the need for job training, English language classes, access to government services, and access to social services. In addition, the community is aging and Branford is viewed as a "retirement destination." A recent study conducted by the town indicates that a significant portion of the population will be over the age of 55 by 2020. Community members viewed the Library as evolving to meet these changing needs in recent years. The Library is committed to doing so into the future.

SHIFTING VIEW OF PHYSICAL SPACE

Noting the role of technology, many community members questioned how the physical space of the Library is currently utilized and how it should be utilized in the future. Suggestions were made to expand small meeting room space, add study carrels, and add a café. Although some community members noted the possible expansion of the Library, due to the anticipated decline in physical books space required, the majority of community members encouraged the Library to consider the

reuse and reconfiguration of the current space. There were also suggestions to increase and reconfigure the dedicated space for teens.

HISTORICAL ICON

The James Blackstone Memorial Library is not only fulfilling a myriad of community needs on a day-to-day basis but it is viewed as an historical icon of the community. The physical building is impressive to all, yet intimidating to some. It is clear from community members that the Library must continue its dedication to the preservation and maintenance of the building while continuing to meet the ever-evolving needs of patrons.

POWER OF HUMAN INTERACTION AND IMPORTANCE OF COMMUNITY

The community raised significant concerns about the impact of technology on the community and on each individual. As more and more community members are constantly "plugged in" to their computers, mobile phones, and tablets, community members noted an increasing need to gather in person to exchange ideas, build relationships, and learn from one another. In addition, the Library is also viewed as a space that can offer refuge from the challenges people may face in their lives. Community members encouraged the Library to take a leadership role in convening the community for educational and enrichment purposes, perhaps even providing experiential opportunities for youth to develop and cultivate their communication and life skills.

"There is a sharing of ideas - and that knowledge brings understanding - which creates a more compassionate and accepting community. The Library can provide a human touch and conversation. It draws diverse people together. The activities foster relationships and create a sense of community. People don't realize what it would be like without the Library."

- Library Stakeholder

ORGANIZATIONAL EVOLUTION IN RECENT YEARS

Community members noted that the Library has evolved in numerous positive ways since the last strategic plan was completed in 2005. The expanded scope of services to support those affected by the economic downturn, the wide variety of programming including the strength of the Children's Programming, the strength of the staff, and an overall improvement in customer service were noted. The access to the LION system, online book holds, and email reminders were also identified as strengths.

MISSION

The James Blackstone Memorial Library
provides essential access to information, resources, and unique shared experiences
to help ensure Branford is an educated and enriched community.

VISION

- The Library is the **community's gathering place for learning, enrichment, and for the exchange of ideas**.
- The **vast collection of resources** that the Library offers, both in physical and digital form, continues to evolve to meet the needs of the community and is available to users in the ways that are most convenient for them.
- The Library offers a **wide range of programming** focused on educating our community to achieve their greatest potential and inspiring their intellectual and cultural curiosity.
- The Library provides **technological support and training** to the community to utilize new tools and resources to access information in a multitude of forms.
- The Library will be a **promoter of literacy** for all ages, both traditional and non-traditional (financial, health, cultural, and other life skills).
- The **staff of the Library continues to be its strongest asset** and expands and cultivates their skills through professional development to meet the evolving needs of the community.
- Led by a dedicated, visible Board of Trustees, **a wide variety of supporters**, with significant support from the Town of Branford, contribute to the financial well-being of the organization, ensuring its ability to serve the community today and for generations to come.

VALUES

- **Equality:** We provide equal access to a vast range of information and resources for learning and enrichment.
- **Welcoming:** We provide a welcoming environment for learning and growth that is open to all.
- **Respect:** We conduct all interactions with respect and treat all users in a fair and equitable manner.
- **Excellence:** We are dedicated to excellence in customer service, available resources, technology, and programming.
- **Stewardship:** We are stewards of the support provided to us by the community of Branford and will act with the needs of our community at the forefront of our decision-making.

SECTION 1: COLLECTION, PROGRAMS, AND SERVICES

Goal 1: The Library will offer a broad array of resources, programs, and services, to educate and enrich the community.

STRATEGY #1: EVOLVE THE COLLECTION

- Expand the digital collection of the Library, utilizing the Library's website as the portal to the digital resources; additions may include an expanded eBook selection, ability to borrow digital music and audio books, online classes, reader profiles, blogs written by patrons and additional online databases.
- Expand the physical book and media collection of the Library including DVDs, CDs, and audio books with a focus on meeting a wide range of community interests.
- Increase in integration with school system needs (including textbooks, summer reading, and relevant topics) and increase resources for adults and children English Language Learners.

STRATEGY #2: EVOLVE PROGRAMMING

- Develop a cohesive framework for programming by constituency groups and/or interest groups (possible examples include young children, teens, parents, older adults, those with cultural interests, job seekers) with identified outcomes and methods of evaluation, focusing on education and enrichment.
- Strengthen partnerships with community groups who offer programming at Library and integrate them into program planning through the establishment of a Programming Advisory Group.
- Create methods to measure the quality of the programming and provide opportunities for attendees to provide feedback.
- Explore feasibility of sponsoring events outside of the Library in partnership with other community groups.
- Create a partnership with Branford Community Television to broadcast live and/or offer streaming videos of programs which occur at the Library.

STRATEGY #3: EVOLVE AVAILABLE SERVICES

- Assess, explore, and implement innovative methods to provide access to physical books and Library services to those who may not be able to visit the Library; additions may include expansion of home delivery service, cultivation of relationships with other organizations to borrow books for specific populations, and delivery of Library services in other locations.
- Investigate additional services that would be useful to the community to offer at the Library or via the Library website that remain consistent with the mission of the Library.

- Assess the collection, programs, and services available to English Language Learners and to teenagers; identify opportunities for the addition of new programs and services or for collaboration with other entities to expand offerings at the Library.

SECTION 2: RELATIONSHIPS

Goal 2: The Board of Trustees and staff of the Library will cultivate and maintain a set of relationships, from town leadership to patrons to donors to volunteers to the general public, to support the mission and vision of the Library.

STRATEGY #1: STRENGTHEN MARKETING

- Develop a marketing plan with approaches and segmentations for different constituency groups to increase awareness of the Library's resources and programs.
- Determine a method to introduce new residents to the Library's resources and programs and encourage new residents to apply for Library cards; consider a Library card registration drive.
- Identify additional methods to communicate the events and services at the Library both within the building and outside the building, perhaps through the use of message boards or electronic kiosks.

STRATEGY #2: STRENGTHEN FUND DEVELOPMENT EFFORTS

- Identify opportunities to share the impact and vision of the Library with town groups and civic leaders to cultivate a desire to provide financial support for the Library.
- Strengthen the organization's ability to raise funds from private donors through donor cultivation, specifically leveraging annual campaign activities.
- Continue to assess the use of special events as a fundraising mechanism.
- Develop initiatives to engage business and corporations.
- Improve the annual report to communicate the impact of the Library on the community and to recognize donors and supporters.

STRATEGY #3: INCREASE PARTNERSHIPS

- Strengthen the relationships with key town elected bodies that are addressing areas of common concern and identify ways the Library can be supportive by creating opportunities for dialogue and learning, related to town-wide issues.
- Continue to strengthen relationships and areas of collaboration with the Branford school systems and other schools in the community to support and enrich the efforts of our schools.
- Continue to strengthen partnership and collaboration with the Friends of Library.

- Develop partnerships with East Shore Region Adult Continuing Education (ERACE) and other nonprofit organizations serving the English Language Learner population and identify specific needs that can be addressed by the Library or through collaborative efforts.
- Identify opportunities to play a leadership role in convening stakeholders within the community addressing a common issue, where applicable.

SECTION 3: SUPPORTS & SAFEGUARDS

Goal 3: The Library will be a warm and welcoming place, which offers a variety of spaces for learning, reading, and gathering. The staff will feel valuable and supported by the organization. The Library will utilize data and information to monitor progress and inform decision making. The Library will be a financially healthy organization.

STRATEGY #1: EVOLVE THE PHYSICAL SPACE

- Undertake an architectural review to determine methods to reconfigure and redesign current spaces within the library to best meet community needs.
- Develop a facilities plan that includes strategies for general improvement, building restoration (where needed), and reconfiguration efforts.
- Review results of parking study with town officials to develop collaborative approach to addressing parking challenges.

STRATEGY #2: DEVELOP OUR STAFF

- Assess and adjust the staff infrastructure to best support the organization.
- Provide consistent opportunities for professional development for all staff, focused on new technologies, new resources, and customer service.
- Strengthen performance management process for staff and for Library Director.
- Monitor staff climate on an ongoing basis and provide annual updates to the Board of Trustees.

STRATEGY #3: EXPAND INFORMATION MANAGEMENT & TECHNOLOGY

- Create a lead technology position within the Library, who would be responsible for providing cross-training to staff and support and training to patrons.
- Establish a Community Technology Committee made up of volunteers with expertise in software and technology to support the Library's efforts.
- Assess the feasibility of developing a database to gather patrons' interests; determine if it can be linked to current card registration system.

- Assess significant technological investments including anti-theft screening tools, self-checkout, and additional website enhancements to improve the user experience.

STRATEGY #4: LINK PLANNING TO FINANCIAL MANAGEMENT

- Monitor financial benchmarks and ratios to track progress over time.
- Following the prioritization of strategies, assess financial impact on organization, review resource allocation, and adjust budget accordingly.
- Continue to research opportunities for cost savings and revenue generation through innovative methods, partnerships, and other means.

SECTION 4: QUALITY ASSURANCE & ORGANIZATIONAL LEARNING

Goal 4: In order to fulfill our commitment to excellence, all services and programs at the Library will be monitored for customer satisfaction and quality on a regular basis.

STRATEGY #1: USE MEASUREMENT TO MONITOR EXCELLENCE

- Create a programming database to track programs and events, attendance, and evaluation data about quality of programs and events; create quarterly reports to communicate information to the Board of Trustees and the staff.
- Provide ongoing customer service training for staff and create additional opportunities for patrons to provide feedback on staff interactions.
- Utilizing information gathered, adjust programs, services, and training accordingly to ensure the highest standards of excellence.
- Create reporting tool for the Board of Trustees to monitor key metrics on an on-going basis.

SECTION 5: CULTIVATING LEADERSHIP

Goal 5: The Library will be led by a visible, dedicated Board of Trustees, who are able fulfill their roles as ambassadors for the organization in the community.

STRATEGY #1: CLARIFY ROLE OF TRUSTEES

- Increase clarity of the Board of Trustees' roles and responsibilities in supporting the Library's future.
- Strengthen Trustee orientation including providing historical perspective of Library's evolution and creating a mentoring program for new members.

STRATEGY #2: EVOLVE BOARD TRAINING AND PLANNING

- Conduct periodic trainings for Board of Trustees on nonprofit governance, fund development, shift trends in the field of Libraries, and new technologies in Library services.
- Develop annual goals for the Board of Trustees in conjunction with the Strategic Plan and in coordination with the goals of the Library Director.

MONITORING PROGRESS

The Board of Trustees will monitor the implementation of the plan and will strive for the following measurable results:

- Increase in the number of registered cardholders, visitors per day, attendance at Library programs, and usage of Library meeting space.
- Increase in the use of the website as a portal to access digital information resources as measured by page views and unique visitors.
- Increase in the number of circulated materials due to improvements to the collection.
- Increasing positive results in customer satisfaction surveys and in quality of Library programming.
- Continued financial support from the town of Branford with wide support of town residents.
- Increase in the number of private donations and other outside funds to support Library funding.

APPENDIX A: CREATING THE STRATEGIC PLAN

The Strategic Planning Committee was established in May of 2012 and included:

- Jan Day, Board of Trustees, Committee Chair
- Fred Biamonte, Friends of the Library
- Heather Brooke, Board of Trustees
- Polly Fitz, Board of Trustees
- David Henderson, Board of Trustees
- Peter Hugret, Community Member
- Andy McKirdy, Board of Trustees
- Kathy Oxsalida, Acting Administrator of the Library
- Carly Rencsko, Children's Department Director
- Deirdre Santora, Circulation Director

The strategic planning process began with the design of the information base for planning. The design included a variety of opportunities for community members and users of the Library to provide feedback. The information base which was gathered from June – September 2012 included:

External Information Gathering

- Individual interviews with 30 stakeholders across the community including patrons, Town officials, community leaders, leaders of nonprofit organizations, donors, and English Language Learner students
- An online community survey which received 455 responses, which was promoted via email, the Library website, local newspapers, and local online blogs
- Focus groups with youth (18 attendees), parents (6 attendees), and heavy users of the Library (4 attendees)

- Comparable library information was gathered from the Newtown, Simsbury, and Glastonbury libraries
- Research on the 21st Century Library and on trends in e-book usage
- Demographic research on Branford was provided by the Town

Internal Analysis and Information Gathering

- Climate Survey of Staff
- Board of Trustees Survey
- Financial Analysis
- Programming Review
- Usage Data
- Collection Statistics

The information was presented to the Committee and to the Board of Trustees as it was gathered. The Committee and the Board of Trustees held a retreat in late September to review the information and develop the plan which was adopted in December 2012.

Developed with support from Fio Partners, LLC