SOUTHBURY PUBLIC LIBRARY

STRATEGIC PLAN: 2012

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INTRO

"We better get this right if we know what's good for us"

The challenges facing libraries today are both serious and complex, and do not lend themselves to any single or simple solution. In particular the pace and direction of technology is promising to be a huge game-changer for all players in the information arena. This challenge has several dimensions; it encompasses the increasing use of e-readers and other digital devices, the immense and growing volume of information existing in cyberspace and the Library's own aging technology. The Southbury Library's Strategic Plan is intended to reposition the Library to effectively meet these challenges. The market place has been cruel to those who have not responded well or who have guessed wrong (Blockbuster, Borders, perhaps Netflix). That's our backyard.

Devising appropriate strategies can only be done by keeping abreast of both the changing technologies and the evolving needs of library users. What is essential is a "baggage-free" focus on the customer, not weighed down or biased by our current systems or product lines.

 Typically the "Time Horizon" for strategic planning is 3 to 5 years, but these are perilous times and we did not delude ourselves into believing we know with any certainty how the competing technologies will shake out and how they will ultimately impact traditional library services. For this reason a good measure of flexibility and risk management have been built into the Library's proposed strategies.

PLANNING THE PLAN

COMMITTEE STRUCTURE

The planning process itself, if properly structured, is perhaps the most important product of strategic planning. Chances for successfully implementing strategies are greatly improved when the planning team includes the very people who will bear much of the responsibility for executing the detailed operational plans that move the Library forward. The value of their understanding and commitment to the plan and their ability to effectively communicate the strategies to others cannot be overstated.

The Southbury Library's planning team had a critical mass of those people. Among the dozen core participants were the Library Board Chairman and Vice Chairman, regular and alternate members of the Library Board, the Head Librarian, a liaison from the Board of Selectmen and the President of the Friends of the Southbury Public Library. When appropriate other Library staff were included in the process.

MEETINGS:

All meetings were chaired by the Library Board Chairman and guided by a facilitator who kept the committee on track. The process ran from December through June and encompassed eight meetings. The first six were done in conjunction with the Library Board's regular monthly meetings and dealt with the Mission, Objectives, and Environmental Issues and Trends. The final two meetings were special sessions of 5 hour and 2 hour durations which focused exclusively on developing strategies for the Library to pursue over the next 3 to 5 years.

RESEARCH AND SURVEYS:

Strategic plans need to be grounded in a solid base of information. Four "research teams" were created to take on this task. Using the resources of the Library and the internet, the teams gathered information about the Library's current and expected future environment. A distillation of these environmental issues and trends appears in appendix A.

Serving the people of Southbury lies at the heart of the Library's mission. The Library is fortunate to have a long-tenured staff that keeps in close touch with the community; however, that "institutional knowledge" must be supplemented with hard data. Once specific proposals for programs and services have been developed, focus groups and surveys will be conducted to test these offerings with their intended audiences, and metrics will be developed to track actual performance against expectations.

THE PLAN

STRATEGIC PLANNING MODEL

ENVIRONMENTAL ISSUES AND TRENDS

LIBRARY MISSION

OBJECTIVES

STRATEGIES

MISSION OF THE SOUTHBURY LIBRARY

The Southbury Library is dedicated to be the source of information and knowledge for Southbury. The Library is the gateway to life-long learning, enrichment, and entertainment. As the heart of the community, we provide a welcoming, accessible, comfortable and safe environment that will be flexible and adaptable to changing library services and technology.

OBJECTIVES

1) Increase productive uses of the Library building by systematically providing more frequent and stronger forums, programs, exhibits and events targeted to every segment of the population.

2) Keep abreast of the rapidly evolving technologies relevant to libraries and implement those that are deemed to be appropriate.

3) Provide a critical mass of value-added data bases and software resources for patrons to access at home or in the library.

4) Enhance the visibility and image of the Library in the community and actively market the "New Library" programs and services.

5) Attract and have access to donations and grants to provide enhancements to the Library that are set forth in the Library's Strategic Plan.

STRATEGIES FOR EACH OBJECTIVE

OBJECTIVE 1

Increase productive uses of the Library building by systematically providing more frequent and stronger forums, programs, exhibits and events targeted to every segment of the population.

1. 1   Increase programs targeted to all demographics   (High Priority)
- "Exclusion to Inclusion" - Become the sponsor of programs already regularly held in the Library, i. e., Saturday Writers Group, Monday History Lectures, etc.
- Coordinate with Parks and Recreation and Senior Center on movies and other programming opportunities
- Conduct a "Survey Monkey" electronic survey to get public response about program ideas
- Some ideas - "One Book, One Town" to involve entire community, Memoir Writing, have plays, author visits, "Family Weekend" to promote card registration, on-line book discussions, etc.
- Upgrade website to view program listings and allow registration for programs
- Develop and analyze metrics on use of meeting rooms -- availability percentage, times most used and attendance

1.2   Outreach to 18-24 year olds.   (High Priority)
- Conduct focus groups for this age group to determine their interest and availability
- "Welcome Home" for college students during holiday and summer breaks
- Offer job searching resources, resume classes, job fair, intern fair, etc.
- Tap into high school community service groups—help senior patrons with technology, student tutors, program assistants, etc.

OBJECTIVE 2

Keep abreast of the rapidly evolving technologies relevant to libraries and implement those that are deemed to be appropriate.

2.1   Upgrade Library's technology   (High Priority)

- Engage a consultant who is an expert in library technology to review and recommend updates to the Library's 7-year old technology configuration
- Assign knowledgeable board member or subcommittee to oversee this engagement
- Review and if needed upgrade Wiring/Bandwidth
- Review and if needed upgrade WI-FI system capabilities
- Provide sufficient electrical outlets to meet increasing use of patron devices
- Equip current and future meeting rooms with appropriate state-of-the-art technology to facilitate events and meetings
    - Video projectors, screens, white boards and smart boards
    - Quality speakers and sound systems
    - Adequate and adjustable lighting
    - Staff availability/training/support so these tools will be productively used

2.2   Outfit Library with digital displays   (High Priority)

- Listing of current and upcoming events and programs and exhibits
- Schedule of meetings
- Activities requiring registration
- Scrolling banner of news and announcements
- Feature on a rotating basis available data bases and services
- Highlights of past programs and events

2.3   Stay abreast of e-book development, devices, pricing and patron demand

- Continue to learn and experiment with e-book devices and implement when appropriate
- Develop metrics to track circulation of e-books and usage of these devices

OBJECTIVE 3

Provide a critical mass of value-added data bases and software resources for patrons to access at home or in the Library.

3.1   Provide how-to tech information and training
- Adult computer lab (portable?) for training of patrons and staff
- Kids tech area with games, entertainment, installed software, etc.

3.2   Provide greater access to on-line data bases and on-line instruction
- Webinars
- Resources for home schooling
- SAT prep courses
- Ancestry.com
- On-line registration for programs and events
- Upgrade website to provide remote access to these resources
- Develop metrics to track usage in this area

OBJECTIVE 4

Enhance the visibility and image of the Library in the community and actively market the "New Library" programs and services.

4.1   Aggressively market Library programs and services   (High Priority)
- Newspaper press releases and announcements
- Use the town and the Library websites
- E-alerts & E-newsletters
- Flyers, outdoor white boards, electronic bulletin boards, road signs at key intersections
- Outreach to middle & high schools, Senior Center, Heritage Village & assisted living facilities
- Public Access TV and Heritage Village TV
- Assign a member of the Library Board or other individual to ensure the development, management and execution of these marketing efforts

4.2   Conduct focus groups and surveys to identify Library programs and services most valued by different segments of the community.

OBJECTIVE 5

Attract and have access to donations and grants to provide enhancements to the Library that are set forth in the Library's Strategic Plan.

5.1 Identify and pursue grant opportunities from corporations, endowment funds, state and federal governments.

Assign a member of the Library Board or other individual to monitor the process of identifying, writing and following up on grant applications.

5.2 Engage in fundraising

Reconnect with the community to once again restore confidence that donor intent will be honored and rebuild the flow of donated funds to the Library to be utilized as determined by the Library Board.

- Issue and publicize policy statements and amend bylaws in ways that address donor concerns
- Resume solicitations of donations through mailings, gatherings, brochures and communications with estate attorneys
- Increase funds held by CCF in order to earn a larger investment return (shift some current balances or steer donations to CCF)
- Establish a closer working relationship with the "Friends of the Southbury Library" so they may serve as an increasingly important focal point for donation
- Review and if necessary rewrite donor brochures and once again stock highly visible and aesthetically pleasing donation boxes in Library
- Publicize how donor funds are being used
- Assign a member of the Library Board or other individual to monitor these fundraising activities

NEXT STEPS

A. Assess Organizational Strengths and Weaknesses

Evaluate the changes needed in the structure and operations of both the Library and Library Board in order to efficiently and effectively implement the strategies.

1. Library :
   - The building
   - Patrons/Library users
   - Staff (size and skills)
   - Support systems/technologies
   - Providers of products and services
   - What are our assets? What do we do well? Where are we weak?

2. Library Board:
   - Operations
   - Size & structure
   - Bylaws
   - Desired talents on Board and involvement of non-board people
   - Committees/Subcommittees
   - Role of the Friends of the Southbury Public Library
   - Interactions with leadership and departments in town hall

B. Communicate Plan to Library Staff, Town Leaders and the Community

C. Use Strategic Plan to Drive Development of the Library's Annual Operating Plan and Budget (town budget) as well as the Spending Plan for Donor Funds

Notes on Meeting Room Space, Staffing and Metrics

The Southbury Library was designed to be flexible to allow space to be reconfigured to accommodate different uses. Strategies that increase the kinds and number of programs and services could require reconfiguring both physical space and staff support.

Possible future areas for meeting space:
- Literacy Corner-2nd floor
- Volunteer/Friends room
- Atrium area
- Divide Kingsley Room vertically
- Open meeting room wing in evenings when Library is closed
- Keep Library open one more evening by opening at noon one day
- Basement space for "messy" programs and other activities, in addition to the Friends Annual Book Sale

Staff constraints:
- Paid Program Coordinator to work under librarians who do the program planning
- Volunteer staffing
- Form AV club (teens, seniors?) to support current and new technology built into meeting room and tech labs.

Metrics:
Solid metrics are required to fully assess the Library's current levels of activity and to measure progress toward accomplishing its strategic objectives.   Much of the required data is currently being captured by Bibliomation and the Library staff. This data needs to be mined and analyzed, and "key indicators" developed. Undoubtedly additional metrics will need to be devised to fill "data gaps" and to track progress as the Library moves into new areas.

APPENDIX A

ENVIRONMENTAL ISSUES AND TRENDS

- Economic/ Demographic
- Governmental/Legal/Legislative
- Technology
- Library Usage/Activity

Economic /Demographic:

1. Population of Southbury will not grow beyond its current level of 20,000.
2. Percent of seniors in the population is the highest in the state and will continue to grow.
3. Town will experience a modest decline in the school-age population.
4. Southbury has a high proportion of single-person households. Demographic shifts and cultural changes will cause this segment to continue to grow.
5. Southbury is a highly literate community. A larger percent of the population have four or more years of college as compared to the state or nation.
6. Median household income is above the state level.
7. Southbury has its share of people living below the poverty level.
8. Surveys indicate young people in town have few places to gather or interact.

GOVERNMENTAL/LEGAL/LEGISLATIVE:

1. State statutes governing the operations of public libraries will not change. Unfortunately this carries a risk, since these statutes are vague and open a wide range of interpretations.
2. As with all departments of town government, the priority and support of the Library will ebb and flow with changes in the economy and town administrations.
3. Local government will continue to "hold the line" on expenditures, including their financial support for libraries.
4. The ability of the Library to access and determine the use of donor funds and the potential for having these rules changed with each new administration are critical issues that affect all components of the Strategic Plan.
5. Keeping a high profile and maintaining lines of communication with policy makers will continue to be important.

TECHNOLOGY:

1. Apps for smart phones and e-books to charge out books and materials will grow.
2. Schools will increasingly shift to virtual textbooks for students.
3. There will be a continued development and increased usage of e-books and tablets.
4. More demand for Apps and mobile-friendly services.
5. Use of social media and digital interactions will continue to evolve and expand.
6. Technology infrastructure of Southbury Library was designed 7 years ago.
7. Issues of privacy and security will stay at the forefront.

LIBRARY USAGE/ACTIVITY:

1. Mix of patrons at different places on the technology learning curve. Patrons will want to acquire and keep current on technology skills.

2. Pricing models for e-books are still evolving. How libraries will ultimately fit into and be impacted by these models is uncertain.

3. Successful libraries will continue to focus on how best to meet the needs and wants of their community. Technology is one of the available tools for doing that well.

4. Increased demand for cultural, educational and recreational programs that raise the quality of life – interactive programs like book discussions, crafts, etc.

5. The role of libraries as a place to socialize and interact will increase.

6. Trend toward declining circulation of library books.

7. Library space will have to be reallocated and perhaps reconfigured to accommodate the evolving mix of library products and services.

8. Growing trend toward self-publishing of e-books will make it more challenging for patrons to choose what to read.

9. There will be more regionalization/collaboration of libraries –as libraries specializing in different topics and specialized services.

10. Libraries will provide access to wider array of specialized data bases and on-line informational resources.

11. Importance of strong technological support like Bibliomation will grow as libraries are challenged to keep up with new technologies.

12. Different staff skills will be needed as the mix of library services evolves.

13. Libraries will increasingly position themselves as an organizing source of local information – (Historical Society information and information from the Town Clerk's offices).

APPENDIX B

DEVELOPING STRATEGIES:

Objectives are the results we want to achieve.

Strategies are the methods or activities we engage in to accomplish these results. They are the pathways we will follow. Several strategies are often needed to achieve one robust objective.

Good strategies are:

- Consistent with the objective(s)
- Mindful of the environmental issues and trends
- "Doable" and leverage current assets and resources
- Compatible with your other strategic thrusts
- Clear and concise
- Well written to effectively communicate to others what must be done

Strategies are less specific than action plans but they have enough substance to provide strong guidance and justification for the development of the Library's action plans and budgets.

Focus and Boldness:

The "Strategy Development" phase of the planning process requires us to put our minds into the future, to think boldly and to be guided by our Mission and Objectives.

By design the scope of our strategy development focuses on devising responses to a future environment of evolving needs, limited resources and rapid technological innovation. **To a greater or lesser extent we have an opportunity to reposition and even reinvent the Southbury Library.** In this process we must be willing to consider new and different activities. We also have to consider getting rid of some existing baggage (even pieces we dearly love) when these activities do not make a measurable contribution toward achieving our desired objectives. Scaling back or eliminating current activities are often the hardest and least popular choices we will have to make.

RANKING THE STRATEGY PROPOSALS

The planning retreat generated a list of 13 proposed strategies. Ten days following the retreat a follow-up meeting was held to review, revise and rank the importance of each strategic thrust. Five strategies receiving the highest rankings by the planning committee were deemed to be "High Priority". Six that received lower rankings are still considered important enough to pursue over the next 3-5 years. Two proposed strategies that received the lowest rankings were dropped from the strategic plan.

LIST OF STRATEGIES IN RANK ORDER

2.1   **Upgrade Library's technology**   **High Priority**

1.1   **Increase programs targeted to all demographics**

2.2   **Outfit Library with digital displays**

1.2   **Outreach to 18-24 year olds.**

4.1   **Aggressively market Library programs and services**

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3.1   **Provide how-to tech information and training**

3.2   **Provide greater access to on-line data bases instruction**

5.1   **Identify and pursue grant opportunities**

5.2   **Engage in fundraising**

4.2   **Conduct focus groups and surveys**

2.2   **Stay abreast of e-book developments**

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1.3   **Sponsor outdoor activities**   **Not a Priority**

1.4   **Add more exhibits**

Southbury Public Library

Strategic Planning Committee

Library Board Participants:

Shirley Michaels, Chairman

Ellie Ackerman, Vice Chairman

Ralph Camasso

Chuck Crowdis

Jeff Krizan

Sherman London

Bob Meisel

Ginny Middleton

Walter Morrissey

Shirley Thorson, Head Librarian

Other Participants:

Ron Pugliese, Board of Selectmen Liaison

Jeff O'Sullivan, President, Friends of the Southbury Public Library

Carol Webster, Library Technical Assistant-Head of Circulation

Yan Toma, Reference Librarian-Danbury Library

Jocelyn Bagger, Secretary

Ken Kerin, Strategic Planning Facilitator