



# **Westport Public Library Strategic Plan**

## **Engaging the Community, Building for the Future 2007 – 2010**

*Adopted by the Library Board of Trustees April 25, 2007  
Updated and revised November 14, 2007; September 17, 2008; and  
October 21, 2009*

## Table of Contents

<b>President’s letter</b> .....	3
<b>I. The Westport Public Library -- Vision and Values</b> .....	4
The Vision of the Westport Public Library:.....	4
The Values of the Westport Public Library.....	4
<b>II. Plan Summary: A Focus on the Future</b> .....	5
Strategic Issues .....	5
<b>III. Strategic Issues, Goals and Tactics</b> .....	6
<b>IV. Measuring Success</b> .....	14
<b>Appendix</b> .....	15
The Planning Process .....	15

## President's letter

October 2009

The Westport Public Library occupies a central place in Westport's downtown. It is also at the center of the town's intellectual and cultural life. More than 1600 people visit the Library on a typical day. Even more individuals access its myriad resources online. The Library has seen an upward trajectory in its usage over the past year, as the global economic recession has impacted Fairfield County families.

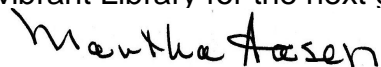
More people are turning to the Library for jobseeking and career information. More families are coming to the Library's many free programs. More children are taking part in the summer reading club and other Library activities. Year-over-year book circulation has increased more than 20%. An astounding 91% of the community's residents have an active library card. Clearly, Westporters use their Library and count on it in their daily lives.

Several years ago the Library Board of Trustees endorsed a three-year Strategic Plan charting the Library's course from 2007 through 2010. This revision represents the final update to that plan. The Strategic Plan guides the staff in the day-to-day management of the Library, and provides direction consistent with what we have heard from the community. At the same time, the plan provides a glimpse into the future as the Library prepares to transform its building into a more functional, accommodating, and lively community space.

The Library's current Strategic Plan concludes at the end of fiscal year 2009-2010. The Library Board of Trustees led by its Planning Committee will soon begin to create a new plan to position the Library for the future. The new plan will address the needs of the Library as it seeks to serve people in new ways in the 21st century: adequate space for collaborative learning; a robust technology infrastructure for professional and business people to create information, opportunities and services; a lively Internet café with space for impromptu programs such as music, author's talks and poetry readings.

Our vision of the Library is to be a true community center – for all who are intellectually curious to find connections. We feel that our programs and services have been moving in positive directions in recent years. But, we also recognize the limitations of the current library building in adequately providing these programs and services for all who seek them.

Westporters use and support their Library. Building on that support, we are confident the Westport Public Library will continue to adapt its services and facilities to remain a vibrant Library for the next generation of users.



Martha Aasen, President  
Westport Public Library Board of Trustees

## **I. The Westport Public Library -- Vision and Values**

### **The Vision of the Westport Public Library:**

*The Westport Public Library is a sanctuary for all that offers unrestricted access to information, programs and state of the art resources. It is a place for individual inquiry and collective learning, intellectual challenge and quiet reflection. The Westport Public Library offers enjoyable opportunities for dynamic social interaction and life-long learning that enrich the quality of life of each of its patrons, young and old alike, throughout each stage of their lives.*

### **The Values of the Westport Public Library**

*The Library serves the community and each of its members according to their needs and interests.*

*The Library provides equal and unfettered access to all regardless of individual abilities or differences. The Library is responsive and non-judgmental in recognizing the diversity of the community it serves.*

*The Library provides a safe and modern facility that offers a welcoming environment for the community's intellectual and social engagement.*

*The Library respects the privacy and confidentiality of its patrons.*

*The Library maintains excellence in both the depth and breadth of its collections by continuously assessing the changing requirements of the community and by responding with innovative approaches supported by current technology.*

*The Library provides its staff with the training and with the opportunities for professional development necessary to keep services both relevant and excellent.*

*The Library is governed by sound financial management and oversight.*

## **II. Plan Summary: A Focus on the Future**

### **Strategic Issues**

#### **Innovative, Customer-Focused Services**

To fulfill its mission, the Library must be able to provide services that are innovative, compelling, convenient and easy to use. In planning for the future, the Library will explore ways it can operate more efficiently and eliminate routine or redundant tasks in order to provide more customer-focused services.

#### **A Hive for Intellectual and Cultural Activities**

The Library provides learners of all ages with guidance and with a setting conducive to a wider search for knowledge. The Library recognizes that its staff, collections and programs - and the building that houses them all - are unique community assets that together create synergies that enhance the impact of other town institutions, schools and businesses serving the community.

#### **A Building that Works Better**

The Library requires flexible and environmentally responsible space that can host an expanded variety of activities in the 21st century: for interactive sessions with pre-readers and quiet research for writers, for lively social interaction and serene contemplation, for technology-supported business meetings and programs on a widening variety of topics that hold interest for the community. Innovative library design will optimize the utility of the existing space and improve community interaction within it.

#### **Expanded Community Awareness**

Awareness of the Library's basic services is high. However, knowledge of its broad range of attractive offerings should be expanded. To convey its many benefits, the Library needs a program of continuous and varied communication to both users and non-users in the community.

#### **Strong and Effective Library Advocates**

The Library must enlist members of the community who can effectively advocate for wide public support of the Library's vision and mission. This will be very important as the Library begins its capital campaign for the transformation of the Library.

### **Investment in Staff**

Library staff has become information navigators for Library users. To meet its commitment to provide the excellent service expected by the community, the Library must provide the staff with ongoing technical training and customer-oriented skills development.

### **Increasing Financial Support**

The Library currently depends upon financial support from the town as well as from private donations to deliver its services. The Library should secure additional sources of public and private funding to ensure its ability to fund its goals.

## **III. Strategic Issues, Goals and Tactics**

Each goal and its related strategies listed below address a strategic issue outlined in part II. The Library's performance in addressing these strategic issues will determine its success in the period, 2007-10.

### **Strategic Issue: Innovative, Customer Focused Service**

Goal 1: Provide library services, programs and public space that meet the changing and growing needs and interests of the community. With the help of state of the art technology, empower librarians to provide improved and personalized services

#### **Metrics:**

- a. *Record and report circulation statistics*
- b. *Record and report numbers of library visitors*
- c. *Record and report numbers of reference queries*
- d. *Record and report web site statistics/analytics*

#### **Tactics:**

#### **1.1 Use new technologies to add value to all library services**

##### **2009-2010**

- a. *Perform a needs analysis of the Library's web site*
- b. *Upgrade the Library website using more current software to enable interactive uses and to increase staff participation in creating content*
- c. *Implement video clips on the Library's web site*
- d. *Implement virtual tours and other content on the Library's web site*
- e. *Customize the web site and catalog for mobile devices*

- f. *Use a search aggregator to combine searches through all of the Library's databases*
- g. *Provide more programs and workshops for the public on trends in technology*

## **1.2 Implement more customer-focused services**

### **2009-2010**

- a. *Expand the role of reference services so that reference librarians can become curators of information in new formats*
- b. *Expand "concierge-type" library service - e.g. reference by appointment, readers' advisory consultations, technology instruction by appointment, roving staff members throughout the Library*
- c. *Expand the "Personal Librarian" program to provide personalized service*
- d. *Offer and promote the Library as the place for regularly scheduled instruction on Internet and catalog use, software applications, email and emerging technologies*
- e. *Re-examine distribution of staff by hour and location to maximize both efficiency and customer service (e.g., scheduling staff "front and center," having reference and circulation staff work together, etc.)*
- f. *Investigate ways of providing more timely information on issues immediately relevant to the community (e.g., wikis relating to news events, e-newsletters relating to health issues, etc.)*
- g. *Create a staff subgroup of Westport residents to help raise awareness of what's going on in the community*

## **1.3 Employ new collection development techniques to reach a broader audience of users**

### **2009-2010**

- a. *Create a new process involving more staff in identifying trends, issues and topics for programs, displays and collection development*
- b. *Expand opportunities for customer feedback*
- c. *Continue the weeding program to renew the collection, create more open shelf space, and prepare for the building project*

## **1.4 Strengthen the connection with teen and pre-teen users of the Library**

### **2009-2010**

- a. *Identify new opportunities for connecting with teens and pre-teens.*
- b. *Cooperate with organizations that serve teens and pre-teens*
- c. *Designate staff to work with the Teen Librarian in services to teens and pre-teens*

**1.5 Increase use by adult groups that are currently underutilizing the Library**

**2009-2010**

- a. *Promote the Library as a place for affinity groups using meetup.com and other social networking sites*
- b. *Host a “back to the Library” type of meeting for people who haven’t used the Library recently*

**1.6 Increase the number of people using the readers’ advisory service**

**2009-2010**

- a. *Create new ways to promote staff’s knowledge of books and other media*
- b. *Continue to develop and implement readers’ advisory training for staff*

**1.7 Reorganize the Library’s existing space to create new opportunities for library use**

**2009-2010**

- a. *Work with and review architect’s suggestions for short-term improvements of space in the Library*

**Strategic Issue: A Hive for Intellectual and Cultural Activities**

Goal 2: Establish the Library as a favorite destination for members of the community who want to convene for social interaction and stimulating consideration of new ideas and current events

**Metrics:**

- a. *Record and report numbers of people attending programs, with specific reference to each strategy*

**Tactics:**

**2.1 Use existing spaces in new ways and develop new partnerships to engage the Westport community**

**2009-2010**

- a. *Use the patio as a community space with more activities*
- b. *Find new sources of program support in the community*
- c. *Explore new programming partnerships inside and outside the community*

**2.2 Offer new programs to attract children, teens and adults who may not currently use the Library.**

**2009-2010**

- a. *Develop staff to act as collaborators in creating new programming to attract new audiences*
- b. *Continue collaboration with local arts institutions to present programs highlighting and complementing community arts events and exhibits*
- c. *Continue to offer occasional Friday evening programs*
- d. *Develop more programs for families to enjoy together.*
- e. *Develop more impromptu programs*

**Strategic Issue: A Building That Works Better**

Goal 3: Create plans to build attractive, appealing and functionally versatile new space that can accommodate a wide variety of simultaneous activities

**Metrics:**

- a. *Report specific progress on tactics and milestones achieved at monthly Library Board meetings*

**Tactics:**

**3.1 Develop plans for the Library of the Future**

**2009-2010**

- a. *Review architect's ideas for expanding and transforming the building*
- b. *Make changes in the current Library to conduct a "trial run" of new concepts for the expanded Library*
- c. *Preview and test ideas for the new building with the community*

**3.2 Position the Library for "The Library of the Future" building campaign**

**2009-2010**

- a. *Meet with key community members to explain and promote plans for expanding and transforming the Library and obtain feedback*
- b. *Establish a Communications Committee of both Board members and non-Board members to draft a communications strategy*
- c. *Create the internal processes required to manage donor pledges and gifts*
- d. *Meet with Town boards to begin the approvals process*
- e. *Develop a budget for the first year of operations in the new Library*

## **Strategic Issue: Expanding Community Awareness**

Goal 4: Provide ways for all segments of the community to become more aware of the value of the Library and its resources/programming to the community

### **Metrics:**

- a. *Record and report the number of new communications outlets and activities and compare year over year progress*
- b. *Record and report the number of presentations to community groups and results of those presentations*
- c. *Develop and administer surveys measuring awareness of and satisfaction with Library resources and programs*

### **Tactics:**

#### **4.1 Increase Westporters' awareness of, and interest in, all the Library has to offer through targeted communication strategies**

##### **2009-2010**

- a. *Fund and implement a marketing/communications position*
- b. *Create a marketing plan*
- c. *Add content to Library's video screens, including movie trailers and promotional videos about Library news and events*

#### **4.2 Create opportunities for residents to learn more about the transformation of the Library**

##### **2009-2010**

- a. *Follow up on the Marketing and Communications Committee recommendations*
- b. *Continue informal presentations of Library transformation*

## **Strategic Issue: Strong and Effective Library Advocates**

Goal 5: Foster a strong and effective group of Library advocates who can guide the growth and development of the Westport Public Library

### **Metrics:**

- a. *Number of people willing to participate*
- b. *Number of times advocates appear/attend meetings, write letters to papers or other outlets on library behalf*
- c. *Number of events advocates attend/host*

**Tactics:**

**5.1 Invest in the skills of the Board of Trustees**

**2009-2010**

- a. *Continue to recruit Trustees who have needed expertise and reflect the diversity of the community*
- b. *Continue to prepare Trustees for the assumption of leadership roles*

**5.2 Develop additional stakeholder groups to advocate for the Library**

**2009-2010**

- a. *Work with the Advisory Council to help identify critical issues for their attention and support*
- b. *Engage the Friends of the Library to support the Library's strategic goals*
- c. *Identify new potential Library support leaders and enlist their involvement*
- d. *Identify people who share an interest in serving the Library and who can contribute to the Library*

**Strategic Issue: Investment in Staff**

Goal 6: Cultivate a Library staff with excellent skills that delivers innovative Library services and programs

**Metrics:**

- a. *Create a checklist of new training opportunities and participation by staff*
- b. *Number of training sessions attended by staff*
- c. *Conduct annual survey of staff on quality/usefulness previous year's and potential new training programs for upcoming year*

**Tactics:**

**6.1 Expand staff development and training**

**2009-2010**

- a. *Review staffing needs to meet growing demands on the Library*
- b. *Develop an orientation program for new staff members*
- c. *Revise the ongoing staffing plan to reflect evolving Library requirements for competencies*

- d. *Develop a comprehensive training program for staff*
- e. *Develop an Intranet for access to staff resources*
- f. *Provide more opportunities for staff training in technology*
- g. *Provide more opportunities for small interdepartmental groups to work on task-oriented solutions*
- h. *Organize staff technology teams for training, mentoring and increasing the number of staff on call for technology issues*
- i. *Increase opportunities for staff mentoring other staff members*

**6.2 Provide tools and resources to help staff do their jobs more effectively**

**2009-2010**

- a. *Establish goals for hiring staff to meet new demands*

**Strategic Issue: Increasing Financial Support**

Goal 7: Identify and successfully secure support from a broad base of government and private sources for the Library's programs and activities

**Metrics:**

- a. *Set goals for appeals, and compare amounts received against goals*
- b. *Compare levels of support to prior years showing increased amounts given and an increase in the number of donors*

**Tactics:**

**7.1 Create a comprehensive development plan to provide a blueprint for improving fund-raising and development results that will position the Library to successfully meet its immediate and long-term goals.**

**2009-2010**

- a. *Implement a three-year development plan to diversify and increase the Library's funding streams, with a focus on foundation and corporate support, planned giving and individual major donors*
- b. *Enhance efforts to recruit, train and motivate qualified volunteers to support staff in promoting the goals and objectives of the development plan*
- c. *Improve and expand non-revenue generating development activities, including research, donor cultivation and professional development*
- d. *Improve and expand marketing and communication components of the development plan with emphasis on an effective annual report; standard proposals for programs, services and activities; brochures*

*on the Library and on specific programs; improved web presence for development goals*

- e. *Reassess the feasibility of undertaking a capital campaign to support the transformation of the Library*

## **7.2 Increase contributions to the Library annual giving campaign**

### **2009-2010**

- a. *Provide fundraising training for the Library Board members and volunteers*
- b. *Expand the list of prospects*
- c. *Enhance web pages specifically focused on the annual appeal*
- d. *Increase the number of appeals for support during the year*
- e. *Reassess current giving opportunities and strategies, including Booked for the Evening*

## **7.3 Increase funding for Library collections**

### **2009-2010**

- a. *Continue to identify materials, resources and equipment that the Library would like to purchase and announce these giving opportunities on the Library web page*

## IV. Measuring Success

Each year, Library staff and Trustees will set aside time to assess their progress in meeting the goals and objectives outlined in this document. In evaluating its success, the Westport Public Library will:

<p><b>Measure levels of community satisfaction</b></p>	<ul style="list-style-type: none"> <li>a) Develop and administer specific community needs surveys (online and print) based on the results of the 2006 satisfaction/opinion survey</li> <li>b) Develop and administer customer satisfaction surveys</li> <li>c) Administer one on one exit surveys in the Library asking people for their impressions and satisfaction with specific services</li> </ul>
<p><b>Monitor and measure levels of support</b></p>	<ul style="list-style-type: none"> <li>a) Record and report levels of public and private support</li> <li>b) Encourage and help guide the growth in numbers and activity level of the Friends of the Library</li> <li>c) Create a semi-annual report encouraging and monitoring growth in the volunteer program</li> <li>d) Report to the Board of Trustees on progress toward meeting annual endowment goals</li> </ul>
<p><b>Measure and analyze customer use</b></p>	<ul style="list-style-type: none"> <li>a) Record and report circulation statistics</li> <li>b) Monitor collection turnover</li> <li>c) Record and report numbers of library visitors</li> <li>d) Record and report numbers of reference queries</li> <li>e) Monitor and record numbers of people attending programs</li> <li>f) Record the frequency of computer use</li> <li>g) Monitor and record frequency of use of databases and Library web pages</li> <li>h) Monitor the percentage of the population using the Library and set high goals for new registrations in each year of the plan</li> <li>i) Develop baseline data about current Library use and measure changes in use following building improvements</li> <li>j) Develop baseline data about specific collections and determine levels of use if featured in special displays</li> </ul>
<p><b>Improve Library efficiency and effectiveness</b></p>	<ul style="list-style-type: none"> <li>a) Measure the number of items loaned using self-checkout</li> <li>b) Measure the number of items downloaded</li> <li>c) Measure the use of the website and other self-service information tools</li> </ul>
<p><b>Increase the level of awareness</b></p>	<ul style="list-style-type: none"> <li>a) Measure the number of new partnerships each year with realtors and other area businesses</li> <li>b) Measure the number of presentations to community groups</li> </ul>
<p><b>Monitor the success of the community forum series</b></p>	<ul style="list-style-type: none"> <li>a) Record and report numbers of participants at programs</li> </ul>

## Appendix

### The Planning Process

Library staff, Trustees and many participating residents contributed a great amount of time and energy to this planning process and to the development of the Westport Public Library's strategic plan. They were assisted by Library Development Solutions, a Princeton, New Jersey library consulting firm. Before launching the planning effort, the Library Trustees determined that the plan should reflect the needs and interests of the community served by the Library. Through the use of focus groups and an online survey, the planning committee reached out to hundreds of individuals to solicit ideas and suggestions for making the Library a more essential part of their daily lives. Library planners listened carefully to this community input, identified the most frequently requested suggestions and worked together to devise a plan to improve the Library.

More than five hundred Westport residents, reflecting all age groups and a wide variety of interests, were involved in the development of this strategic plan.

A number of key assumptions helped lay the groundwork for this plan. Planners agreed that:

- The Library has made progress in implementing its current plan by making additional space available in the Library for quiet study and other uses.
- Westport's population will not grow significantly, but families with young children will comprise the largest segment of the population.
- An increasing number of older adults will choose to remain in Westport.
- Tax support for the Library will not significantly increase over the next few years, thereby requiring the Library Trustees and staff to seek additional private support to expand library services.
- The Library has become the recognized center for community activity and lifelong learning, bringing people together to share common values and concerns.

The planning process included:

#### **Focus Groups**

Fifty-one Library staff, Trustees and community residents met in four focus group sessions facilitated by the planning consultants. During these sessions participants discussed their ideas for improving Library service, shared what they liked best about the Library, and identified areas needing improvement.

### **Online Survey**

Four hundred and eighty five residents and Library users responded to an online survey regarding the Library. Their comments and suggestions assisted with the development of the revised plan. The survey results are available in the Library.<sup>1</sup>

### **Meetings with Library Staff and Managers**

The consultants met with Library staff, Trustees and the Library management team to explore concerns and to solicit ideas for inclusion in the strategic plan.

### **Meetings of the Planning Committee**

A planning committee comprising mostly Trustees and staff met on numerous occasions to review the outcomes of the focus groups and survey, to review staff and Board recommendations for the plan, and to finalize recommendations for future Library directions.

## **Westport Public Library Board of Trustees\***

Martha Aasen, President  
Eduardo N. Andrade, Senior Vice President  
John B. Hooper, Vice President, Development  
Terry Vance, Vice President, Finance  
Andrew B. Nevas, Vice President, Governance / Nominations  
Andrew Moss, Vice President, Planning  
Jocelyn Barandiaran, Secretary  
David J. Katz, Treasurer  
Russell Baris  
Julie Belaga  
Kathie Fording, Friends President  
Linda R. Franciscovich  
Melissa Kane  
Jonathan S. Lach  
Marianna McCall  
Sandy Nathan  
Thuy Tranthi Rieder  
Cliff Sirlin  
Robert Wachsler  
Michael Wolfe

\* Board of Trustees as of July 1, 2009

## **Consultants**

Alan Burger  
Leslie Burger

---

<sup>1</sup> 2006 WPL Survey results