

Westerly Library
Wilcox Park

STRATEGIC PLAN

Memorial and Library Association

2019-2022



STRATEGIC PLAN

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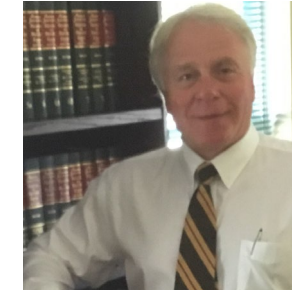
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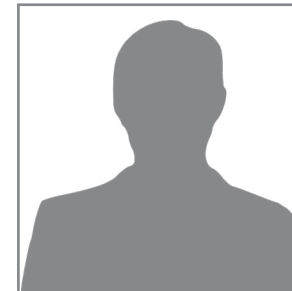
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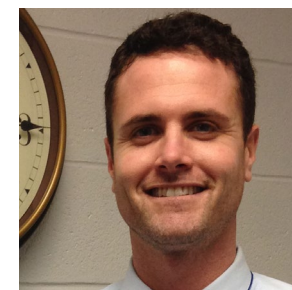
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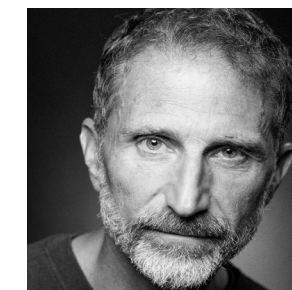
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Task Force

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Deborah Bell	Board of Trustees
Kelli Butler	Marketing and Communications Manager
Melanie DeSantis	Teen Librarian
Amy Grzybowski	Community Member, Director of Westerly Education Center
Robert Holland	President, Board of Trustees
Brigitte Hopkins	Executive Director
William Lancellotta	Assistant Director
Alan Peck	Park Superintendent
Mary Weiss	Friends of Westerly Library and Wilcox Park

Subcommittees

Community

Melanie DeSantis, Chair
 Bethany Austin
 Sarah Berger
 Erik Caswell
 Anne Marie Doyle
 Tammy Grant
 Amy Grzybowski
 Mary Carol Kendzia
 Amanda Sperry
 Yulyana Torres

Finance

Brigitte Hopkins, Chair
 Kelli Butler
 Bill Meyer
 Mary Weiss

Marketing

Kelli Butler, Chair
 Brigitte Hopkins
 Anne Driscoll
 Jenn Obrey

Operations

Bill Lancellotta, Chair
 Bethany Austin
 Erik Caswell
 Rob Holland
 Rob Gizzarelli
 Tim Hayes
 Sue Marelli
 Helen Mochetti
 Colleen Walsh-Jervis

Technology

Bill Lancellotta, Chair
 Tim Hayes
 John Piccirilli
 Amanda Sperry
 Allynn Wilkinson

Park

Alan Peck, Chair
 Debbie Bell
 Rich Brooks
 Sandi Carmichael
 Ian Newbury
 Martin Neiberg
 Paul Panciera

Introduction

In April 2019, the Memorial and Library Association Board of Trustees (Board) approved a Rolling Strategic Plan (RSP) covering years 2019-2022 to help bridge the gap between the past and the future Strategic Plan. In 2016, the Board hired ESC (Empower Success Corps, Boston) to guide the Board in creating a new Strategic Plan which was implemented from 2016 to 2019. Using the existing plan as a template plan, the Board agreed in April 2019 to revisit the mission, vision, core values, and strategic priorities. The goal was to complete the Rolling Strategic Plan by August 2019, seek Board approval at the August 20, 2019 Board meeting, and begin implementation following its presentation at the annual meeting of the Incorporators on September 18, 2019.

A RSP allows for a shared understanding of where the Association wants to be and how best to get there. This process helps guide the Board and staff to improve and expand services including programs and activities as well as provide financial sustainability largely in areas of development.

The members of the RSP Task Force represented the critical Library departments, Park, and community to ensure that all interests were represented. Strategic Priority Subcommittees were formed, each with a focus on a specific strategic priority, and each priority expanded their membership to reach appropriate stakeholders. There was a work plan for each Subcommittee meeting. The Board was updated periodically and were asked for feedback.

Step 1: Complete an Environmental Scan

Data was gathered in 2018 and 2019 covering the following (located in the Appendices):

- Board of Directors’ Assessment, May 2018
- Staff Climate Survey, October 2018
- Community Survey, April 2019
- Board of Directors’ Retreat to Identify Strengths/Weaknesses/Opportunities/Threats, April 2019
- Future Trends, April 2019

Step 2: Analysis

Analysis of all environmental scan data enabled the RSP Task Force to consider where the Association is and where it wants to be in two to three years. The Task Force met bi-monthly from April 2019 through August 2019. The Mission, Vision, and Core Values were refined in response to the data. Six Strategic Priorities were identified and delegated to Subcommittees for detailed goal setting.

Step 3: Subcommittees for each Priority to write goals with tactics

Subcommittees were composed of Task Force members, additional staff, and stakeholders. The Subcommittees met several times to develop the goals and actions to achieve the strategic priorities in the next two to three years. This included identifying goal priorities for year one, two, and three.

Step 4: Board of Directions approval

August 20, 2019. Implementation of the RSP to begin September 18, 2019. The new Board will evaluate progress on a regular basis.

Mission

The mission of the Memorial and Library Association is to strengthen community and enrich lives by stimulating intellect and sparking imagination through access to literature, information, technology, nature, and the arts.

Vision

Westerly Library and Wilcox Park strives to be a premier intellectual, cultural, and botanical asset for the region.

Core Values

Stewardship | Preserve the library and park to ensure relevance in the future with respect to our rich past.

Equitable Access | Provide resources, technology, information, and facilities to all people regardless of race, sexuality, gender expression, ability, spirituality, or age.

Respect | Honoring diversity, individual perspectives, and the right to privacy and confidentiality.

Collaboration | Promote and facilitate cooperation and intellectual engagement.

Enrichment | Bring meaningful fulfillment through programs, resources, innovation, and nature.

Strategic Priorities

1. Ensure Financial Stability
2. Raise Awareness through Expanded Marketing And Public Relations
3. Engage our Community Resources and Partnerships
4. Advance a Culture of Operational Excellence
5. Advance Access to Technology And Innovation
6. Protect and Promote Natural Resources

Strategic Priority 1 | Finance: Ensure Financial Stability

- Goal 1:** Educate the public and stakeholders on the sources of support and revenue to increase annual giving, bequests and the endowment
- a. Pro-actively and periodically inform the town governments of Westerly and Stonington of ongoing operating expenses and funding requirements
 - b. Regularly invite town representatives to events publicly recognizing their attendance
 - c. Update website for users to easily locate financial information, such as “pie charts” with categories by dollar amount and percentage of each category of support and revenue
 - d. Make available to donors highlights of activities and services including financial information
 - e. Identify and target organizational contributors, non-profit and for-profit, to support the Library and Park in a variety of ways, e.g. sponsorships, in-kind contributions
 - f. Collaborate with the RI Library Association to improve advocacy and legislative action on State and Federal levels
- Goal 2:** Maximize use of Library and Park facilities to increase revenue
- a. Compare facilities to other spaces to price competitively, increase fees for private use of facilities, and rent space to users
 - b. Separately charge for additional services and/or equipment, e.g. kitchen, auditorium stage
 - c. Make facilities available outside regular hours for additional charge
 - d. Expand services to Watch Hill Memorial Library and Improvement Society and Weekapaug Fire District Library by preparing and distributing an informational brochure describing the relationship with and resources at the Library and Park
- Goal 3:** Develop a long-term strategic budget (3-5 years) to ensure financial stability
- a. Anticipate and plan funding for targeted budget items, that exceed 10% of their budget and will likely arise in the future
 - b. Incorporate metrics based on measured outcomes, e.g. new donors, rate of retained donors, loss of donors, growth in donor contributions
 - c. In response to strategic needs identified in the longer-term strategic budget, research, select and submit appropriate funding (i.e.. Grants) to meet specific Library and Park needs
- Goal 4:** Foster Ambassadors to connect to Donors
- a. Select and train Board members, Friends, Incorporators and staff to reach out to current and new donors to educate them about programs and services as well as financial realities
 - b. Educate Board of Trustees of their role to “Give and Get,” i.e. not only to give but to actively get contributions
 - c. Solicit Incorporators, who have not donated to begin contributing
 - d. Set realistic targets to increase contributions by existing donors
- Goal 5:** Identify revenue generating activities
- a. Explore revenue-sharing arrangements with users of the library and park
 - b. Collaborate and share resources with other non-profit organizations to foster collaboration and reduce expenses
- Goal 6:** Innovate and Invigorate Funding
- a. Select person(s) who is passionate about the Library and Park to increase funding
 - b. Tailor annual fundraising and planned giving to be more donor-centric
 - c. Implement new fundraising techniques that spark community interest and involvement
 - d. Coordinate strategic budget for fundraising to address major capital expenses (looking out 10-15 years)

Strategic Priority 2 | Marketing: Raise Awareness through Expanded Marketing and Public Relations

- Goal 1:** Educate the public regarding the role and mission of the Westerly Library and Wilcox Park
 - a. Target Marketing
 - b. Develop elevator speeches for Staff, Board, Committees and Volunteers
 - c. Increase in press releases regarding news and events/programs
 - d. New format for the electronic newsletter with enhanced information being distributed to public
 - e. Develop an email to invite individuals to “opt-in” to receive electronic newsletter
- Goal 2:** Increase brand awareness through consistent graphic representation and content
 - a. Implement procedures and tools for the staff and others to utilize and assist in Marketing and Communication goals
 - b. Explore refreshing logo to offer an renewed look and feel to the branding
 - c. Develop a branding standard guideline to include, but not limited to, logo use, approved fonts, approved color scheme(s), templates for flyers, website images, posters, brochures, postcards
- Goal 3:** Increase our social media presence and leverage audience to share/engage with our content
 - a. Evaluate most effective platforms and decide if we should focus on only two in order to maximize our resources and effectiveness
 - b. Identify types of posts that are engaging audience the most and leverage similar information/posts
 - c. Invite people to like our Facebook page
 - d. Paid sponsored posts
 - e. Promote engaging content
- Goal 4:** Streamline internal communication regarding marketing efforts
 - a. Create and distribute a timeline of marketing efforts
- Goal 5:** Create financial transparency
 - a. Develop an easily located and user friendly infographic “pie chart” containing information on categories by dollar amount and percentage of each category of support and revenue, e.g. grant appropriations, contributions, endowment
- Goal 6:** Strengthen Library and/or Park programs and awareness in the community
 - a. Identify areas of the public we are missing/not reaching and find ways to engage with them
 - b. Promote events in a timely manner, allowing people to plan ahead for upcoming programs/events
 - c. Target market specific programs to certain demographics and audiences based of their preferences
 - d. Survey program and event attendees
- Goal 7:** Generate community-wide engagement and support of services and programs
 - a. Leverage partnerships within the Community Collaborative Association, potentially paid social advertisement rotating through various organizations that are part of the Association
 - b. Survey program and event attendees, library and park users, visitors, staff

- Goal 8:** Generate increased publicity and support of fundraising efforts
 - a. Paid sponsored posts
 - b. Create advocates and ambassadors
 - c. Use of website slider “position 1” for added publicity
 - d. Develop and distribute press releases for local newspapers
 - e. Use “Mann About Town” monthly spot to promote
 - f. Survey fundraising event attendees, donors, library and park users, visitors, staff
- Goal 9:** Update current website and make it as ADA compliant as possible
 - a. Promote technology and resources through the addition of a technology section on the website
 - b. Expand website virtual tour and park information
- Goal 10:** Updated signage/wayfinding and informative information
 - a. Explore ways to utilize in house technology to update
 - b. Assess, design, replace, and add to current signage while remaining flexible for future change
- Goal 11:** Reach non-library users in the community
 - a. Identify areas, demographics, age ranges of non-library users (e.g.. Pawcatuck, North End, Bradford, seasonal residents, etc.)
 - b. Facebook target marketing based on findings
 - c. Place brochures in laundromats and senior centers (and explore the possibility of Free Libraries “On the Road”)
- Goal 12:** Develop a wireframe and prepare for a transition to a new website for Westerly Library and Wilcox Park
 - a. Streamline the number of clicks to obtain information
 - b. Reorganize information in a logical way to find information easier
 - c. Enhance ADA Compliance beyond current capabilities

Strategic Priority 3 | Community: Engage our Community Resources and Partnerships

- Goal 1:** Establish ongoing partnerships with Westerly and Stonington Public Schools
 - a. Outreach to principals and department heads
 - b. Hold regular meetings with school librarians and youth services departments
 - c. Make schools aware of summer reading theme ahead of time
 - d. Coordinate school and library summer reading programs
 - e. Provide mobile library services to neighborhoods during the summer
 - f. Establish tutoring program at library for area students to support school performance
 - g. Disseminate flyers for youth programs at area schools
 - h. Host workshops for teachers on database training
 - i. Library card sign ups at school open houses
 - j. Embed research instruction & digital literacy into school curriculum
 - k. Meet with parent organizations
 - l. Meet with school social workers and nurses

- Goal 2:** Enhance and build on existing relationships with organizations and agencies in the community
 - a. Continue model of community spotlight, hosting fun programs outside the library’s walls in partnership with local organizations
 - b. Work with local community centers to offer programming outside of the library for youth
 - c. Partner with the Westerly Land Trust on teen space community garden
- Goal 3:** Increase public awareness of local organizations’ needs and services
 - a. Host a library “open house” or “welcome days” with events in various departments, as well as invite other organizations and agencies to participate
 - b. Provide a private space in the library for social service organizations to have drop in hours on site for meetings and consultations
 - c. Work with partner organizations so staff can make suitable suggestions for social services
 - d. Educate current library patrons and the population about social needs and issues in the community
- Goal 4:** Create a directory of local organizations that offer services and accommodate needs in the area
 - a. Work with Jonnycake and Town of Westerly to create directory
 - b. Publish directory on website, as well as on town website. Maintain periodic updates, ensuring information remains relevant and accurate
 - c. Establish listserv of local Westerly-Pawcatuck/South County organizations to make sure information is relevant and current
- Goal 5:** Make staff aware of all existing partnerships and of services offered by partnered organizations.
 - a. Educate staff so they are aware of local services and organizations
 - b. Offer professional development opportunities for staff and volunteers
- Goal 6:** Ensure new residents of Westerly-Pawcatuck are aware of library services
 - a. Create welcome packet to mail to new residents, both home owners and renters
 - b. Provide library tours to new patrons and organizations serving new populations
 - c. Work with realtors to provide library package for people new to town/renters
- Goal 7:** Establish partnerships with day care centers and preschools in the community
 - a. Hold storytime at day care centers around the community
- Goal 8:** Reach non-library users in the community; increase participation and use by diverse and marginalized populations
 - a. Partner with local cultural organizations and expand community outreach. Provide joint cultural programming in South County
 - b. Establish partnerships with local native communities, organizations and museums, making land acknowledgment a priority
 - c. Promote current offerings that cater to marginalized groups for adults and teens, including SAGA (Sexuality and Gender Awareness)
 - d. Provide fundraising programs that are more financially accessible
- Goal 9:** Work to expand services to new Americans, speakers of other languages, as well as adult basic education patrons
 - a. Develop multilingual resources. Provide library card applications in multiple languages (especially Spanish) to meet needs of community and changing demographics
 - b. Implement support services for students of adult basic education. Have designated staff to lend

- homework help and advice to adult patrons
- c. Work with Literacy Volunteers to provide library tours and information sessions
- d. Work with Westerly Education Center to attend appropriate events and classes to encourage library use

- Goal 10:** Raise awareness of social issues affecting the community at large
 - a. Assess community needs by reaching non-library users in addition to patrons

- Goal 11:** Improve accessibility to library services
 - a. Establish mobile library services
 - b. Build Little Free Libraries™ and place in various neighborhoods, especially those beyond walking distance from the library
 - c. Establish a flex stop at the Westerly Library
 - d. Offer more wayfinding and guides for digital resources
 - e. Establish programs at senior homes, including digital programming

Strategic Priority 4 | Operations: Advance a Culture of Operational Excellence

- Goal 1:** Evaluate the environment to encourage access to resources and accommodate changing patron needs
 - a. Review the library layout / materials presentation
 - b. Develop a plan to improve user satisfaction and accessibility
 - c. Develop visual appeal standards for library spaces, create staff training, and design an implementation plan
 - d. Conduct an inventory of items currently stored in underutilized spaces
 - e. Transform underutilized space into either functional staff workspace or a usable patron area
 - f. Develop a plan for Circulation that accommodates staff needs as well as those of the patrons
- Goal 2:** Update and implement Facilities Master Plan
 - a. Expand department by hiring in-house custodial staff to replace the current cleaning service
 - b. Restore the cottage to functional use
 - c. Replace the chiller
- Goal 3:** Provide training, education, and development for internal stakeholders
 - a. Establish competencies for all library staff in line with national standards and best practices
 - b. Cross-train all staff at each of the public services desks (Children’s, Circulation, Young Adult, and Reference)
 - c. Create a schedule of staff development opportunities including webinars, conferences and in-house training
 - d. Provide management training for Department Heads
 - e. Develop a plan for retaining staff in a competitive labor market
 - f. Intermittently schedule administrative staff at public service desks
 - g. Explore partnerships with other area libraries in providing fill-in staff who are already familiar with Sierra and basic library procedures
 - h. Develop Internal Staff Communication Plan
 - i. Explore expanding Fun Committee role and turning it into a staff advisory committee

- j. Provide cultural competency training for all staff and board members

Goal 4: Optimize staffing levels and hours of operation to best meet the needs of the community and the Association

- a. Evaluate current hours of operation and develop a plan to best meet the community’s needs
- b. Determine appropriate staffing levels
- c. Develop strategies to address culture and climate issues impacting library and park staff
- d. Create a volunteer Volunteer Coordinator position
- e. Create Library and Park Leadership Development Plan

Goal 5: Create a Development team

- a. Hire /assign data entry Development position
- b. Hire Development person
- c. Explore adding a Development line to the budget

Goal 6: Improve cooperation between the Association and the Town of Westerly

- a. Identify contacts within Town of Westerly government who can work with the library
- b. Establish a community liaison from the staff

Goal 7: Prepare for all types of emergencies

- a. Update, train, and regularly practice Emergency Action Plan and dPlan™ (online disaster planning tool) with internal stakeholders

Strategic Priority 5 | Technology: Advance Access to Technology and Innovation

Goal 1: Sustain quality technology services that provide opportunities to people of all ages

- a. Develop a curated YouTube playlist of instructional videos
- b. Promote makerspace materials / resources through website, flyers, brochures
- c. Create instructional videos for library users (for software and equipment)
- d. Expand loaning of non-traditional library materials
- e. Weed print materials of outdated content/add most up-to-date materials to the collection
- f. Provide access to Lynda.com classes

Goal 2: Provide technology experiences for patrons that will connect, inspire and inform

- a. Build a collection of VR (virtual reality) games and software
- b. Conduct programs that showcase the technology experiences available at the library
- c. Add additional VR equipment that circulates
- d. Add smart table/smart board technology to the makerspace

Goal 3: Develop and enhance staff and Board skills in information technology and information literacy

- a. Encourage use of staff and Board portal as a way to enhance internal communication
- b. Establish technology competencies for all staff and Board members
- c. Require staff trainings to improve staff technology skills
- d. Offer Board trainings to improve Board technology skills
- e. Investigate Office 365 for Non-Profits or other cloud based service for email and data storage

Goal 4: Plan for the continual updating of all equipment and technology

- a. Create a schedule for the replacement of all computers and software
- b. Create a 10 year Capital Project Plan for technology
- c. Update wireless network (recommended for every 5 years, currently over 4 years old)
- d. Explore a dedicated public printer that is airplay compatible
- e. Replace one of our two servers

Goal 5: Insure the library’s relevance through a strong online presence

- a. Inventory what is currently available digitally on the website
- b. Create a library YouTube channel
- c. Increase the amount of documents, CDs, programs and exhibitions that offsite patrons can access through the website

Goal 6: Invest in future technologies and plan for funding them

- a. Investigate grant opportunities related to technology - apply for two per year
- b. Provide a full set of tech line items for the budget, including equipment and supplies
- c. Work with the Board to achieve maximum funding for the needed services
- d. Work with local companies to receive donations of equipment and funding
- e. Provide grant writing workshops for staff and other non-profits

Goal 7: Provide for educating all patrons, present and future, on technology and innovation

- a. Offer a regular schedule of technology classes
- b. Offer outreach classes to the Elms and Senior Center
- c. Explore a Seniors Helping Seniors program with tech literate volunteers
- d. Explore creating asynchronous classes/lessons for patrons to accommodate as much of the public as possible

Strategic Priority 6 | Park: Protect and Promote Natural Resources

Goal 1: Preserve the historic integrity of Wilcox Park

- a. Repair and replace all masonry elements on the Esplanade, around the Memorial Fountain, and throughout the Park
- b. Gently clean statuary periodically and keep as natural as possible. Preservation monuments and statues, many of which are granite, is vital to the Granite Industry history of Westerly
- c. Develop a graffiti removal kit/plan so that graffiti incidences can be addressed ASAP
- d. Install stone wall along perimeter at site of old YMCA Tennis court

Goal 2: Expand Stewardship Opportunities

- a. Annually review/update Park Use Policies based on observation and event experiences
- b. Update Memorial records and make available on Library website
- c. Continue seeking appropriate grant opportunities

Goal 3: Sustain and Improve Horticulture

- a. Continue collaboration with the URI Master Gardeners in education and gardening
- b. Update tree inventory

STRATEGIC PRIORITIES AND GOALS

- c. Continue succession planning
- d. Add more tree IDs
- e. Continue IPM (Integrated Pest Management)
- f. Plan for and replace esplanade plantings

Goal 4: Improve Collaboration and Programming

- a. Develop art classes programming in Park/start sketching crawls (classes) with local schools
- b. Continue collaboration with URI (University of Rhode Island) Master Gardeners, RINLA (Rhode Island Nursery and Landscape Association), RI Tree Council, Land Trust, Schools, RISD (Rhode Island School of Design)
- c. Expand website virtual tours and Park information
- d. Increase Park/Library focused programs that coordinate with Children's and Teen Programs
- e. Make Park more accessible to the physically impaired
- f. Using donations, use seed packets of native plants, fruits, and vegetables to build seed collection for patron use

Goal 5: Build Stronger Infrastructure

- a. Comfort Station improvement (install new hurricane glass windows and original grates, clean and paint exterior, and install trench drains to shed water off rear of building)
- b. Maintain (and replace where needed) Memorial fountain systems (pump, filter, water make up, lights, sump pump, etc...) as well as pond pump and overflow drain
- c. Complete conversion of LED lights in lamp posts. (Experiment with the look of LED-filament style bulbs on lower bulb)
- d. Install new greenhouse

Goal 6: Increase Park Staff

- a. Expand budget to accommodate one additional full time employee to existing Park Staff

The Rolling Strategic Plan, spanning from September 2019 through August 2022, describes the Memorial and Library Association's Mission, Vision, Core Values, Strategic Priorities, and Goals have been set. The outcomes and deadlines will be used to track the progress of Westerly Library and Wilcox Park's effectiveness in managing its strategic priorities over the next three years.

The goals were set to meet and anticipate future needs of our users and greater community. They will keep us relevant, sustain and improve our infrastructure, and ensure proper care of our facilities, resources, staff, funding, and governance.

We look forward to working with all patrons, community members, visitors, donors, stakeholders, Board members, Incorporators, staff, and volunteers in helping us continue to maintain our purpose and achieve our objectives.





The September 2019 - August 2022 Rolling Strategic Plan
was approved by Memorial and Library Association
Board of Trustees on August 20, 2019