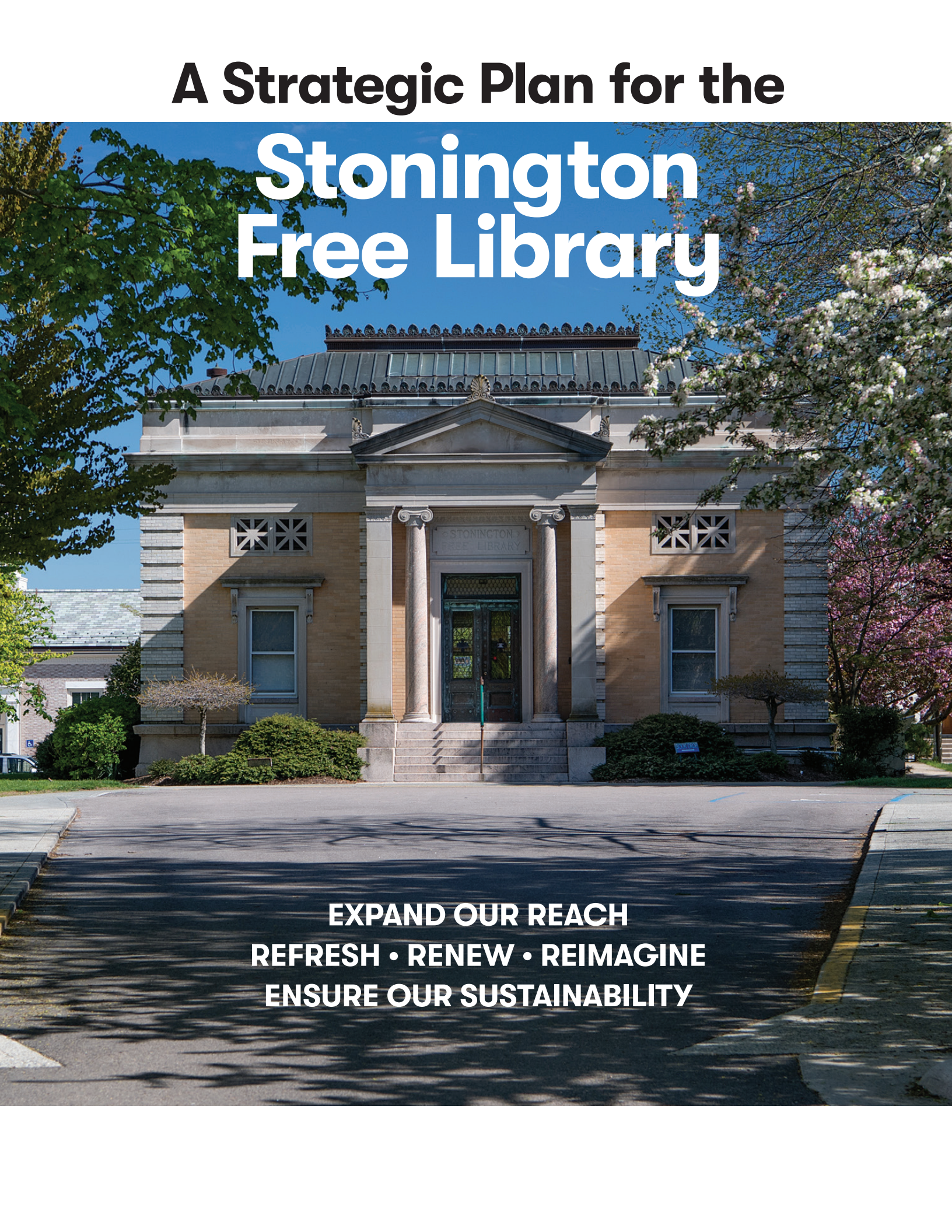


# **A Strategic Plan for the** **Stonington** **Free Library**



**EXPAND OUR REACH**  
**REFRESH • RENEW • REIMAGINE**  
**ENSURE OUR SUSTAINABILITY**





**STONINGTON  
FREE LIBRARY**

July 2017

Dear Friends of the Stonington Free Library,

These are exciting times at the Stonington Free Library! Two years ago the Board of Trustees launched a strategic planning process. We engaged a highly respected consulting firm to assist us and last spring we embarked on the most rewarding and valuable part of the planning process—engaging the community.

The community's response to our outreach was overwhelmingly positive and reflected a remarkable level of participation. More than 600 people responded to our survey and over 100 attended six focus groups for in-depth discussions about the library. Through this process, the people of Stonington spoke loudly and clearly: the community values the Stonington Free Library and wants it to continue to grow and evolve in dynamic ways. Their message was unequivocal: *Retain the helpful, welcoming personality that has been the hallmark of the library, while modernizing its collections, reimagining its space and expanding its reach with relevant activities to more of the community.*

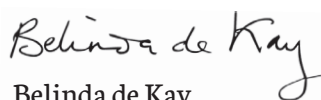
This strategic plan reflects the commitment of the library to respond to the community's message of support and encouragement. The feedback we received from the community and the ideas generated throughout the process have inspired and energized the staff and trustees. The plan will guide the board in prioritizing initiatives according to importance and financial impact. Several initiatives, including expanding our reach to more members of the community, redesigning our website, increasing offerings in our digital library, and reimagining our physical spaces, are already underway.

We look forward to continuing our successful partnership with the community as we implement new strategic initiatives to improve Stonington Free Library's services and programs. We are grateful for the generous support of the Community Foundation of Eastern Connecticut whose funding made it possible for the library to create this plan. We thank former Library Trustee Mary Kelley for her tireless efforts and imaginative and skillful leadership of the strategic planning process. Our consultants, Leslie Burger and Alan Burger of Library Development Solutions, provided invaluable insight and expertise.

Finally, we are profoundly grateful for the enormous effort put forth by the Stonington community whose participation in the development of this strategic plan served as a continuous and tangible reminder that our central mission is, and must always continue to be, to serve the entire Stonington community.



Nicholas Kepple  
President, Board of Trustees



Belinda de Kay  
Executive Director

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# Introduction

**O**ver the last two years, the Stonington Free Library has undertaken an exercise in self-assessment and community engagement, resulting in a plan to more effectively serve the people of the Town of Stonington. The formal strategic planning process consisted of a community needs assessment, an analysis of Stonington's demographic trends, and an internal assessment guided by outside experts. The effort was inspired by the Board of Trustees' and staff's belief that an examination of who we are, what we do, and why we do it is vital to our effectiveness.

This strategic plan represents how we intend to advance our mission. It sets forth broad goals and identifies objectives and initiatives designed for long term success. Our overarching goal in constructing the plan is to remain a vibrant library and a center for community learning and engagement.









# Mission

**The Stonington Free Library seeks to enrich lives and build community by bringing information, ideas and people together.**

*Adopted June 2017 by the Board of Trustees*

**I**mplementation, the ongoing refinement of the plan, and decisions on priorities will always be guided by the library's mission statement.









# Strategic Goals

**T**hree distinct goals emerged from the strategic planning process. These goals will guide the library's ongoing operations, programs and fundraising efforts over the near and long term as the fiscal condition of the library allows. While the goals remain static, the objectives and initiatives associated with each are dynamic; it is expected that they will change and be refined as the library evolves.<sup>1</sup>

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<sup>1</sup> With the help of our consultants, the library staff and board has developed specific proposed initiatives that support the strategic goals and objectives outlined in this strategic plan. These proposed initiatives are set forth in the tables in Appendix A. The tables correspond to each of the three goals in the plan. Each table is organized by those initiatives that are currently underway, those that are planned and will be pursued when and if funding allows, and those under consideration. New initiatives are likely to be added and some may be eliminated. The library is committed to making its strategic plan a living document that will be responsive to the evolving needs of the community, as it has done throughout its 130-year history.

## Goal A: Engage the Community and Extend the Reach of the Stonington Free Library

Located on historic Wadawanuck Square in the heart of the Borough of Stonington, the Stonington Free Library was founded to serve the entire community of

Stonington—a town of more than 18,000 people spread over 50 square miles. The library is a private organization serving the public and in that sense, is not a typical public library. Nor is the library alone in serving the town's 18,000 residents. While the Stonington Free Library is the only library within the borders of the Town of Stonington, it is one of three area libraries that is convenient for many town residents. The Stonington Free Library is equidistant from the Westerly Library (in Rhode Island) and the Mystic and Noank Library (in the town of Groton).



On average, the library has had approximately 3,600 cardholders over the past three years. Summer represents a time of peak usage with the number of library

visits nearly doubling (375 visits/day in July 2016) compared to winter (200 visits/day in February 2017). The library's highly successful children's program consistently attracts more than 700 participants from a wide geographic area. We also offer well-attended adult programs year-round. A primary goal in the coming years is to extend our reach by increasing our visibility, cultivating new users, and becoming more useful in the everyday lives of residents.

In the past year, the library has made significant efforts to increase our reach



into the community. We have expanded programmatic offerings; begun establishing collaborative relationships with other libraries and community organizations; augmented digital offerings, access and resources; instituted mechanisms for tracking program participation and service usage; and created a satellite location at the Pawcatuck Neighborhood Center, among other initiatives.

In addition to these efforts, the library will pursue the goal of expanding our reach into the community through an appropriate mix of strategies designed to meet the following specific objectives:

- 1. Implement a communication system through both traditional and digital means that allows the library to**

**effectively communicate all it has to offer to the entire Stonington community**

- 2. Provide increased library resources and programs to meet identified community needs**

- 3. Extend the library's presence beyond its existing physical space and into the digital realm, schools, neighborhood and community centers, civic and cultural events and activities, among others**

- 4. Create and strengthen collaborative relationships with the other area libraries and nonprofit organizations to leverage resources and collectively provide enhanced services to the community**

## **Goal B: Restore, Renew and Reimagine the Spaces of the Library**

The Stonington Free Library's building was originally constructed in 1898. It was expanded in 1956, and again in 1990. Today, the library consists of 4800 square feet, including a main floor, basement level floor and a small, third floor alcove area accessible by a narrow staircase. Although the physical space is warm and inviting, it is crowded with the immovable shelves that occupy a substantial amount of floor space. The furnishings and décor are old and outdated and the space lacks sufficient electrical outlets for the current and expected needs of its users. Furthermore, the building

is currently not fully accessible to the entire community.

We are actively culling our collection of obsolete or little-used titles and exploring effective ways to present our offerings. We are improving the speed and strength of our internet connection, increasing our digital services and refining methods for organizing electronic files and data. Also, with the assistance of an architect and design firm, we are currently examining ways to improve accessibility and better utilize the library's space.

In addition to these efforts, the library will pursue the broader goal of restoring, renewing and re-purposing our spaces through initiatives designed to meet the following specific objectives:

- 1. Refresh, restore and modernize the library's physical space to offer the community a welcoming place to gather, work, read and gain access to digital resources**
- 2. Re-examine the needs of the library's main facility in light of the role of the library as a center for the**



**community's intellectual and cultural life**

- 3. Maintain a dynamic, relevant collection of print and digital resources that inform, entertain and inspire people of all ages**
- 4. Install and maintain modern technology infrastructure and digital services**
- 5. Create processes and procedures for organizing and managing the library's digital information and data**

## **Goal C: Ensure the Sustainability of the Stonington Free Library for Future Generations**

Unlike many libraries that function as a municipal department funded entirely through taxpayer dollars, the Stonington Free Library was founded and continues to exist as a private association library. Throughout our long history, the Stonington Free Library has relied on generous donations from residents and patrons. The library also receives financial support from

the Borough of Stonington and the Town of Stonington, which also provides funding to the Westerly Library and the Mystic and Noank Library, both located in other towns. Further, the library has called upon an extensive network of volunteers who support our annual fundraising efforts, participate in our programming and serve in various other capacities.



As a result of changing demographics and ever increasing fixed costs, the library's financial resources are currently not adequate to sustain our long term needs. We are closely examining ways to reduce ongoing expenses, increase annual operating revenue, and increase the size of the library's endowment. A healthy endowment fund is essential for the library to be innovative while remaining fiscally sound. The library must increase its endowment in order to accomplish our goals. Without an adequate endowment, our programmatic offerings will be stunted and important maintenance to our physical structure is at risk. A recent gift to the fund has improved the library's solvency, however additional gifts are required to secure a stable financial future.<sup>2</sup>



The library sees its staff and volunteers as essential to its future. The library must attract and retain an exceptional staff, which requires appropriate and competitive compensation. Similarly, for the library to remain connected and relevant to the community, it must attract and retain the services, wisdom, experience, and financial support of its citizens. It is imperative that the library engage the community, including identifying and cultivating future leaders and volunteers.

In order to ensure the sustainability of the library for future generations, the library will pursue actions designed to meet the following specific objectives:

- 1. Review library spending priorities on a rigorous cost/benefit basis, consistent with the objectives of this strategic plan and the needs of the community**
- 2. Institute a quality improvement process to evaluate, streamline or eliminate unnecessary, ineffective, or redundant practices**
- 3. Ensure ongoing excellence in library staff through appropriate staffing, competitive compensation, and ongoing professional development**
- 4. Increase annual giving through enhanced outreach efforts and the cultivation of Capital/Endowment giving resources**
- 5. Pursue opportunities for broad-based advocacy through funding, public awareness, collaborative enterprises, and library program initiatives**
- 6. Ensure that the composition and expertise of the Board of Trustees is aligned with the library's strategic goals through a board development and recruitment plan to ensure fulfillment of the library's future governance needs**

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<sup>2</sup> As part of our planning process we have assessed our sustainability and concluded that the current operational budget is not sustainable on a long-term basis. An increase in the annual operating revenue, a substantial increase in the size of endowment, or both, are necessary.









# Conclusion

**T**his strategic plan will guide the board and staff over the coming years as we continue to adapt and reimagine the library to meet the needs and desires of the community we serve. Stonington Free Library is a jewel of the community and is committed to the core belief that everyone should enjoy free access to knowledge and learning. As we enter the next era of bringing information, ideas and people together, the three goals in our new strategic plan remind us that the Stonington Free Library is a living organization that both supports and is supported by a diverse and appreciative community.

Respectfully submitted,  
The Board of Trustees  
Stonington, Connecticut  
July 2017



# Appendix A

## Proposed Action Steps in Furtherance of Strategic Goals and Objectives

**I**nitiatives have been developed to support the strategic goals and objectives and are organized by those that are currently underway, those that are planned and will be pursued when funding allows, and those under consideration. The initiatives are dynamic and expected to change as the library evolves. The library is committed to making this plan a living document, which responds, over time, to the evolving needs of the community in the same way we have tried to do for one hundred and thirty years.





## Goal A: Engage the community and extend the reach of the Stonington Free Library.

[The initiatives are numbered according to the objective(s) to which they are associated.]

Currently underway	Planned or to be pursued as funding allows
<b>Increase programmatic offerings on a broad array of topics</b> relevant to all ages, interests and needs <sup>2</sup>	<b>Extend the library hours</b> physically and through a virtual front desk, particularly in the evening and during times of intensive school activities <sup>2,3</sup>
Pursue and foster <b>outreach and collaborative initiatives</b> with other libraries and community organizations, including the Stonington Nonprofit Round Table <sup>3,4</sup>	<b>Increase digital resources</b> that inform, entertain and inspire people of all ages, including technology training platforms and digital media services <sup>3</sup>
<b>Increase digital services</b> including digital resources, access and instruction <sup>3</sup>	Effectively <b>communicate library offerings</b> <sup>1,5</sup>
<b>Increase card holders and circulation</b> <sup>1,3,5</sup>	Establish an annual conversation with the <b>community</b> to solicit <b>feedback</b> <sup>1,2</sup>
<b>Track reach</b> through statistics related to library program participation and use of services <sup>2</sup>	<b>Support democracy and civic engagement</b> (act as a site for voter registration, information) <sup>3</sup>
<b>Maintain a high functioning website</b> which effectively communicates library resources and activities <sup>1,3</sup>	<b>Create new advocacy roles</b> for board members and supporters (town meetings) <sup>3</sup>
Develop and maintain an effective <b>social media presence</b> <sup>1,3</sup>	Sponsor an <b>annual community open house at the library</b> themed around library offerings <sup>1,5</sup>
<b>Increase youth involvement</b> (through a teen advisory board, focused programmatic offerings) <sup>2,3</sup>	<b>Increase participation in the One Book, One Region program</b> in southeastern Connecticut (offer program based on the theme of the selected book) <sup>2,4</sup>
<b>Expand volunteer programs</b> (at Wadawanuck Square and satellite locations) <sup>3</sup>	<b>Offer topical pop-up events</b> in response to a local or national event or issue <sup>3</sup>
<b>Increase email database</b> to 3,500-4,000 (by 10-25%) <sup>1</sup>	

## Goal B: Restore, renew, and reimagine the physical spaces of the Stonington Free Library.

*[The initiatives are numbered according to the objective(s) to which they are associated.]*

Currently underway	Planned or to be pursued as funding allows
<b>Website redesign launched</b> August 2017 <sup>4</sup>	<b>Refurbish the library's interior</b> , including new furniture, shelving, carpeting, paint, and electrical infrastructure, with the help of an interior design/architectural firm <sup>1</sup>
<b>Improve handicap accessibility</b> to meet ADA standards and re-purpose existing space <sup>1,2</sup>	<b>Improve use and flexibility of space</b> (reduce space devoted to physical media storage, use of moveable furnishings, exploring creation of meeting space, reorganizing staff workspace) <sup>1,2</sup>
<b>Refine the collection</b> by eliminating antiquated material <sup>3</sup>	Analyze network and electrical needs and <b>reconfigure digital infrastructure</b> accordingly <sup>4</sup>
<b>Increase digital services</b> including digital offerings (Overdrive collection and features), resources and virtual engagements <sup>3,4</sup>	Install <b>new collection and directional signage</b> to enhance and simplify user experience <sup>1</sup>
<b>Refresh the library's visual identity</b> <sup>2</sup>	<b>Collaborate with the Stonington Village Improvement Association and the Stonington Borough</b> (review landscaping on Wadawanuck Square) <sup>1</sup>
<b>Improve high speed internet connection</b> <sup>4</sup>	
<b>Organize electronic files and data</b> (implement file structure and naming conventions, etc.) <sup>5</sup>	



## Goal C: Ensure the sustainability of the Stonington Free Library for future generations.

*[The initiatives are numbered according to the objective(s) to which they are associated.]*

<b>Currently underway</b>	<b>Planned, to be pursued</b>
<b>Increase town funding support</b> <sup>1</sup>	<b>Increase the annual fund revenue by 2% annually</b> <sup>1</sup>
<b>Pursue state and local grant funding opportunities</b> <sup>2</sup>	<b>Establish capital fund and budget</b> <sup>1</sup>
<b>Update policies and procedures, change, adapt and omit where necessary</b> <sup>4,5</sup>	<b>Offer staff professional development and continuing education opportunities</b> <sup>3</sup>
<b>Characterize endowment funds (restricted, unrestricted)</b> <sup>1</sup>	<b>Identify ways to reduce recurring expenses and deploy assets efficiently</b> <sup>5</sup>
<b>Establish guidelines and process for all new expenditures</b> (e.g., develop procedures for pricing initiatives prior to commencement) <sup>1</sup>	<b>Formally establish</b> the existence and size of an <b>SFL Endowment</b> and create an agreed upon model for analyzing the anticipated size of the endowment based on projected investment growth, regular draws, and extraordinary draws <sup>1</sup>
<b>Revise the endowment distribution guidelines</b> to limit the annual draw to an agreed upon percentage <sup>1</sup>	<b>Determine the extent to which additions to the SFL endowment are necessary</b> to achieve sustainability and create a plan for raising needed funds <sup>1</sup>
<b>Establish fundraising goals</b> for the annual operating budget and endowment to achieve sustainability <sup>1</sup>	<b>Cultivate new funding streams</b> , including new donors and targeted program funding <sup>2</sup>
Designate one or more <b>youth positions on the board</b> <sup>4</sup>	<b>Develop a succession plan for the board of trustees</b> that identifies potential board members and prepares them for board service <sup>4</sup>
Regularly conduct <b>staff evaluations</b> <sup>3</sup>	<b>Increase donor retention</b> to 70% <sup>1</sup>
Ensure that <b>library staff is adequately compensated and trained, appropriately sized and deployed</b> <sup>4</sup>	<b>Increase revenue from fundraising events</b> by 5% annually <sup>1</sup>



# Appendix B

## The Evolution of a Plan

### **May 2014**

The Stonington Free Library Board of Trustees considers pursuing a strategic plan based on a presentation by Diana Leslie, Leadership Consultant to Non-Profit Boards

### **April 2015**

Led by Trustee Mary Kelley, the board begins developing a detailed request for proposals from library planning firms

### **October 2015**

The board considers proposals and selects Leslie and Alan Burger of Library Development Solutions. A strategic planning committee is tasked with constructing a draft strategic plan for board consideration

### **January 2016**

Library Development Solutions commences an assessment of the library and develops a strategy for community engagement on the plan

### **June 2016**

A set of survey questions is developed and focus group attendees identified

### **July 2016**

The community survey yields over 600 overwhelmingly positive responses about the importance of the library in the fabric of Stonington life

### **July - August 2016**

Focus groups are polled for thoughts on the present and future role of the library

### **September 2016**

Survey and focus group results are reviewed by the board and staff





### **October 2016**

The staff and board convene a planning retreat with the consultants

### **October 2016**

The consultants provide technology and space assessments of the library

### **November 2016**

An initial draft plan is reviewed by the Strategic Planning Committee

### **February 2017**

A revised draft plan is reviewed by the Strategic Planning Committee

### **March 2017**

The Strategic Planning Committee votes to recommend a draft plan to the full Board of Trustees for adoption

### **June 2017**

The Stonington Free Library Board of Trustees adopts the strategic plan and the proposed initiatives

### **July - August 2017**

The consultants apply final edits and new visual identity to the final version of the Strategic Plan

### **October 2017**

The strategic plan for the Stonington Free Library is shared with the community



