Wellesley Free Library Strategic Plan

2019–2023

WELLESLEY FREE
LIBRARY

TABLE OF CONTENTS

*Additional Supporting Documents can be found on the Wellesley Free Library's website:
https://www.wellesleyfreelibrary.org/wfl-strategic-plan-2019-2023/

INTRODUCTION

The Wellesley Free Library (WFL) is one of Wellesley's cornerstones and a leader among Massachusetts' public libraries. The Main Library is located in the center of town, opposite the Town Hall, and two branches, the Wellesley Hills Branch and Fells Branch, are located at the east and west ends of town, respectively. In addition, the library hosts a very robust website that is a "virtual branch."

Wellesley's population is, on average, highly educated and economically affluent, and has high expectations for the WFL, which strives to meet the needs of the residents. Based on statistics of WFL use, an extensive audit of patron visit behaviors, and direct feedback received through focus groups and a large quantitative survey of patrons, the WFL is succeeding in its mission "to serve as a community gathering place, a cultural destination and a gateway to ideas for residents of all ages."

> *"I 'discovered' the library this past year…with my young children because of the 'robots' show during the week (while I was on maternity leave) and was amazed by the resources (i.e. space, books, tablets, activities). Now, we go at least once a month to play, borrow/return books, etc. It's one of the reasons why you pay to live in the area."*
>
> *– Survey participant and new Wellesley resident*

The Massachusetts Board of Library Commissioners (MBLC) statistics show that for the latest year reported (2015), the WFL circulated 857,786 items, an increase of 138,561, or 19%, over the last six years and an increase of 245,375, or 40%, over the last ten years. The 2015 statistics also show that at 29.49 items circulated per capita, the WFL had the highest per capita circulation of any library in its population group of 25,000–49,999 residents.

The townspeople clearly consider the library to be the "heart of the community," an entity that serves their needs with comprehensive collections of books and other materials. The WFL is also highly regarded for its physical spaces, state-of-the-art technology, relevant and entertaining programs, artistic displays, and up-to-the-minute access of information through its website. As one older focus group participant reported, "My wife wants me to move to Florida. I said, 'Not unless we can take the WFL with us'."

In 2003, the WFL opened its state-of-the-art main building with an auditorium, meeting rooms, study rooms, a technology classroom, dedicated spaces for children and young adults, and underground parking. Over 14 years, the types of library services desired by the community have evolved significantly,

> *"I love how the library is always changing, moving ahead, in both services offered and looking for efficiencies."*
>
> *– Survey participant*

library usage has grown exponentially, and there has been a considerable advancement in technology, which has shaped library user needs.

The WFL is proud of its success. By looking forward and anticipating future needs, it expects to remain successful, useful, and relevant, rather than becoming complacent or stagnant.

"[The Wellesley Free] Library is a special place; [a] great resource for families, and serves a as a hub in the community."

– Survey participant

The goal of the WFL for the next five years is to maintain the high levels of offerings to which its patrons have become accustomed as well as ensure that the offerings and facilities evolve to keep pace with changing needs and expectations. This strategic plan is intended to provide the guidance to ensure that decisions about future directions for the WFL are made thoughtfully, with patron needs in mind.

Purpose of the Strategic Plan

In the 21st century, the need for careful planning in order for the library to remain relevant to patrons is as strong as ever. Rapidly changing technology, emergence and growth of new materials formats, potential reductions in state and/or municipal funding, stewardship of public-private partnerships, and demand for more and different types of meeting spaces are among the many issues that will drive decision making over the next five years.

This is the first strategic plan created under the direction of the WFL's new Library Director, Jamie Jurgensen, and as such, gives the community insight into her vision for how the WFL can best serve the residents of Wellesley.

This plan follows on the Strategic Plan for the Wellesley Free Library, 2014–2018.

BACKGROUND

Strategic Planning Process (Methodologies)

The development process for the WFL Strategic Plan 2019-2023 has been quite extensive. In preparation, the WFL Trustees reviewed and reaffirmed the Mission and Vision Statements of the WFL. The Strategic Planning Committee (SPC) was formed in the fall of 2016, with the goal of creating a comprehensive plan to guide the library through the next five years. The first formal meeting of the Committee was held in January of 2017. The SPC consisted of representatives from the Library Trustees, administration and staff, supporting organizations (Wellesley Free Library Foundation and The Friends of the Wellesley Free Libraries), and patrons.

Committee work began with distribution of the planning timeline, information on the Town of Wellesley, and relevant articles on library trends. The SPC held monthly meetings to discuss ideas, such as what types of information was needed and how to source it, how to reallocate space within the Main Library building (e.g., including additional small- to medium-sized meeting rooms, a possible café, "maker spaces," a revamped Children's Room), operational approaches (quiet vs. low voice policy; roaming customer service vs. stationary help/reference desks), the history of library use, and how best to communicate with the public.

Because the WFL is a public library largely funded through tax dollars, the SPC made great efforts to include the public in the planning process.

> **Computer Usage Survey:** In January and February, a survey on computer usage was available for patrons on all in-library PCs. The purpose of this survey was to collect information on how patrons are using WFL PCs at the WFL. A total of 90 patrons responded to the survey.

> **Focus Groups and Interviews:** To obtain input from the WFL's many constituencies, the SPC held multiple focus groups in February 2017 at the WFL, led by Chuck Flaherty, a consultant, and Beth Sullivan Woods, a Trustee at the time. This qualitative research provided valuable insight for the development of the quantitative patron survey and the observational usage study. The opportunity to participate was broadly promoted to residents and users in the library as well as through word-of-mouth and email. In addition, focus groups were held specifically for Town Meeting Members, members of Wellesley's civic organizations, and local business leaders. In-depth interviews were also conducted with department heads and board members from the School Department, Board of Selectmen, Recreation Department and Wellesley's Council on Aging, These boards and departments were selected for their insights into needs of the community, synergistic offerings, and relationships with key patron/resident constituency groups.

> **Quantitative Patron/Resident Survey and Observational Study:** Next, the Committee developed a quantitative survey to solicit feedback from town residents and non-resident WFL users. The survey was made available through the WFL website and in hard copy throughout the library. It was highly publicized through the local newspaper, social media, emails and notices using contact list of key constituency groups (email and postings by

PTO/schools to parents, Town Meeting Members, Town news and announcement list serve, and other town departments). The survey was available for four weeks in April 2017 and 1,082 individuals participated, providing a representative sample matched to town demographics. Additional information was gathered by training designated WFL staff members to observe and record patron activity at specified times of day between March and May of 2017. A total of 7,608 observations of patron activity were recorded (7325 at the Main Library and 283 at the Hills Branch).

In April, the Consultant led two SOAR (strengths, opportunities, aspirations, and results assessment) visioning sessions with the WFL staff.

As a final step, the SPC completed a similar SOAR exercise for the WFL in May 2017, taking into consideration all of the data collected during the strategic planning process.

In June, the SPC ranked the action items that were identified during the SOAR exercise. Based on the Committee's work, the Committee Chair, the Library Director, and the consultant discussed and fine-tuned a list of five-year goals and objectives for the WFL. The document was then reviewed and approved by the SPC at a July 19 meeting.

The final report of the SPC was submitted to the Library Trustees for approval in August 2017.

Mission, Vision, and Values of the Wellesley Free Library

The Mission, Vision and Values of the Wellesley Free Library are the core of the library and drive all decisions, both strategic and operational. On September 8, 2008, the WFL Board of Trustees adopted its Mission and Vision. The Values were adopted on February 2, 2009. In preparation for this process, minor updates to the Mission and Vision were adopted by the Trustees on December 12, 2016. Following are the current (amended) Mission, Vision, and Values statements.

Mission:

The mission of the Wellesley Free Library is to serve as a community gathering place, a cultural destination, and a gateway to ideas for residents of all ages and interests. Through comprehensive collections and innovative spaces, technologies and programs, the Wellesley Free Library provides free and convenient access to information both within and beyond our walls.

Vision:

The vision of the Wellesley Free Library is to become the cultural, intellectual, and virtual crossroads of the community, to provide exceptional library services, to make connections, and to be a leader among public libraries.

Values:

At the Wellesley Free Library, we value …

>**Our Patrons** … we strive to deliver our services in a welcoming and responsive manner.
>
>**Our Employees** … their myriad contributions make the Library a superior institution.
>
>**Our Supporting Organizations** … their generous gifts provide enhancements that enrich the experience of every Library patron.
>
>**Excellence** … we encourage Staff, Trustees, and Volunteers to be creative, innovative, and strive for excellence.
>
>**The shared responsibility** … of Staff, Trustees, and Volunteers who are all essential participants in fulfilling our mission.
>
>**The needs of the community** … which drive our services and collections.
>
>**A sense of community and fellowship** … by ensuring that the Library is a gathering place that supports collaborative enquiry, diversity and enrichment through programs and offerings for all ages.
>
>**An informed and literate citizenry** … we actively promote our services, programs and the use of our collections to foster access to information, a critical role in a democratic society.
>
>**Collaboration** … with other Town organizations and institutions.
>
>**Intellectual freedom** … we promote and defend intellectual freedom and we acquire materials that represent the widest diversity of views and expressions.
>
>**Ethical and fiscally responsible stewardship** … of all public and private resources.

Wellesley's Unified Plan

The Town of Wellesley is currently in the process of creating a Unified Plan that will combine the traditional 10-year Comprehensive Plan with a strategic vision for the community. The Unified Plan will identify goals for Wellesley in areas such as: land-use planning, economic development, housing, transportation, education, and Town Government operations. The target for adoption is the Annual Town Meeting in spring of 2018. The Committee has closely followed the development of the Unified Plan and has utilized information gathered through that process. The goals for the WFL presented in this strategic plan align with, and are supportive of, the vision and values approved by the Unified Plan Committee in spring of 2017. This strategic plan will be shared with the Unified Plan Committee after approval by the Trustees.

Vision for Wellesley:

In 2040... Wellesley is a town recognized for its welcoming community culture and exemplary town services; commitment to education and life-long learning; a quality of life that enhances the health and social well-being of its residents; respect for the environment and support for sustainability, conservation, and protection of physical and historical assets; and for its dynamic and thriving business community. Wellesley is recognized for its fiscally sound, well-managed, innovative, and accessible town government that has strong citizen participation and a highly-motivated, collaborative and talented professional staff.

Wellesley's Values:
(Italicized values are <u>directly</u> supported by 2019-2023 WFL strategic goals and initiatives. See THE STRATEGY section of this report for details.)

- ***Diversity:*** *Establish, implement and support ongoing initiatives to maintain Wellesley as a community that welcomes a diversity of people and households.*
- ***Sense of Community:*** *Foster a sense of community and community-building through support for inclusive services and facilities, town-wide events, multi-generational activities, and community gathering places.*
- ***Town Character:*** *Establish policies, practices and criteria for the preservation of the character of the town's residential neighborhoods, commercial centers, and open spaces.*
- ***Excellence in Service Delivery:*** *Provide a broad array of services to residents and other users of town services; maintain a strong customer service orientation that strives for excellence in every aspect of service delivery.*
- ***Education:*** *Support best-in-class public education, library, recreational and senior services.*
- ***Healthy Lifestyles:*** *Enhance the health and wellness of residents through public health initiatives, educational, social and recreational opportunities; create the conditions for healthy lifestyles through easy access to healthful food, medical and psychological care, support systems, non-motorized transportation options, and town facilities.*
- **Connectivity of People and Places:** Provide safe, accessible, and efficient transportation choices including public transportation, pedestrian and bicycle pathways, to connect people to town destinations and the region.
- ***Conservation and Sustainability:*** *Make resource-efficient choices to conserve energy, water, and materials; improve water and air quality and reduce carbon emissions; develop and implement sustainable practices to adjust to changing environmental conditions.*
- ***Town Asset Management:*** *Maintain, protect, preserve, and enhance the Town's physical assets including facilities, infrastructure, parks, open space, and natural resources.*
- **Business-Friendly:** Support existing and new businesses in commercial areas that complement and enhance our community, while protecting quality of life and environmental resources.
- ***Collaboration:*** *Leverage resources and expertise of local private businesses and institutions, as well as neighboring towns and regional agencies, to achieve mutual goals.*
- ***Best-Practice Implementation:*** *Establish best practices and priority-based resource allocation systems to support town services, infrastructure and capital investments in a fiscally-prudent manner; conduct long-range fiscal/financial planning that includes appropriate metrics for evaluating progress and adjustment to changing financial conditions.*

- ***Democratic Government and Citizen Participation:*** *Promote participation and engagement in town governance and decision-making.*
- ***Transparency:*** *Facilitate public access to information, making it easy to understand how town government works, how decisions are made and how to get involved; encourage input from and effectively communicate with residents and other stakeholders*

CLIMATE ASSESSMENT

The Wellesley Free Library plays a critical role in the quality of life and growth of the Wellesley community but it does not operate in a vacuum. The strategic plan took into account not only issues affecting Wellesley but also the broader political climate at the state and national level, which can affect local decision-making.

Nation

Federal support is an important part of library revenue. States receive federal library program funds through the Institute of Museum and Library Services (IMLS). The Library Services and Technology Act (LSTA) is part of the annual Labor, Health and Human Services, and Education appropriations bill). LSTA grants are the primary source of federal funding for libraries.

In the last several years, Massachusetts received an increasing amount of LSTA grant money: $3.06 million in FY 2013, $3.11 million in FY14, $3.18 million in FY15, and $3.22 million in FY16[1].

Early in 2017, IMLS funding was at risk of complete elimination via the President's proposed budget. A bipartisan compromise in May, however, not only saved IMLS funding, but also added an additional $1 million to its funds, which assures funding only through the end of September 2017. Beyond that, federal funding for libraries remains at risk given the current priorities in Washington[2].

Massachusetts

The nation and our Commonwealth faced a financial crisis and recession in 2008. But with a highly educated population and strong health and technology sectors, Massachusetts currently fares well with a slightly below average level of unemployment (4.2%, compared with 4.3% nationally, as of May 2017) and poverty (11.6%, compared with 15.5% nationally, in 2014)[3].

The Massachusetts economy continues to expand, with a real GDP growth of 2.0% in 2016 (1.5% nationally). Also in 2016, Massachusetts had a per capita personal income (PCPI) of $65,137, which was ranked second in the U.S. and 131% of the national average of $49,571. Nevertheless, many state residents continue to face hardship stemming from the economic downturn and other factors such as the high cost of living in the Commonwealth.

Despite considerable lobbying efforts advocating for a greater investment in state libraries, the FY2018 Massachusetts budget (signed by the Governor in July, 2017) shows only a slight increase

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[1] *Massachusetts ILMS Funding Report: FY 2011-2016*.

[2] Peet, Lisa. "Federal Budget Compromise Keeps-and Boosts-IMLS Funding." *Library Journal*. N.p., 23 May 2017. Web. 06 July 2017.

[3] United States. Dept. of Commerce. Bureau of Economic Analysis. *Massachusetts: Personal Income*, 28 Mar. 2017. Web. 6 July 2017.

over FY2017[4] in the lines for library services and resources. **State aid to Public Libraries** received a $90,000 (1%) increase, to bring the total to $9,090,000. Local libraries can use the state aid in any way that supports library services. **State aid to Regional Libraries** received an increase of $98,835 (1%) over the FY2017 budget, to bring it to $9,982,317. This money goes toward funding of the Massachusetts Library System (MLS) and the Library for the Commonwealth at the Boston Public Library (LFC). At the time of this report, it is still possible that there will be legislative overrides. However, indications are that the FY2018 budget for libraries will remain as is, with the Massachusetts Board of Library Commissioners in deficit, at 1998 levels, the Massachusetts library System 44% below 2002 levels, the library automation networks 52% below 2002 levels, and State Aid to Public Libraries 10% below 2009 levels.

A 2016 report of the American Library Association[5] notes that public libraries (as well as academic and school libraries) continue to face an uncertain economy as they shift resources and services to meet the needs of the 21st-century digital world. Libraries are responding to ever-changing needs of children and teens while continuing to serve adults utilizing libraries as a lifelong learning resource. Towns have limited their tax-funded library budgets while at the same time library use has increased, including patron use of materials, access to the internet, job training, and other free services.

Town of Wellesley

To understand the climate of Wellesley, it is critical to review the town's demographics[6].

With a population of about 28,000, Wellesley is a desirable, bustling, and revenue rich community, with library services in high demand. The town's labor force is very highly educated (98% of residents, 25 years or older, have completed high school and 83% hold a bachelor's degree or more; 50% have a graduate or professional degree) and is overwhelmingly employed in management and professional jobs.

The median age in Wellesley was 36.2 in 2015. From 2000 to 2010, the population increased 5.1%, with an average household size in 2015 of 2.8 people. In 2015, 26.9% of the population was under 18 years old, while 13.8% was age 65 and older. Also in 2015, 3.7% of people age 65 and younger had a disability.

Wellesley home values have steadily risen since 2012. The median value of owner-occupied housing units 2015 was $936,900.

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[4] "Governor Vetoes Center for the Book; Maintains Funding in Other Library Lines - MBLC." *Governor Vetoes Center for the Book; Maintains Funding in Other Library Lines - MBLC*, MBLC, 18 July 2017, mblc.state.ma.us/news/news-releases/2017/nr170718.php.
[5] *The State of America's Libraries: A Report from the American Library Association 2016*.
[6] Demographic statistics in this section: "QuickFacts." *U.S. Census Bureau QuickFacts Selected: Wellesley CDP, Massachusetts*. Web. 06 July 2017.

In 2010, 85.1% of Wellesley's population identified as white, 2.0% identified as black or African American, 0.1% identified as American Indian or Alaskan Native, 9.8% identified as Asian, 3.6% identified as Hispanic or Latino, and 2.1% identified as two or more races.

In 2015, 19.1% of people age 5 and above spoke a language other than English at home.

Wellesley is the proud home of two private colleges, Babson and Wellesley, and Massachusetts Bay Community College. Approximately 10,600 students attend these colleges[7].

Development continues to be significant in Wellesley. At the time of this report, there were at least five potential 40B projects being discussed, representing a possible influx of new residents. In additional, several sites, in particular, are either under development or have the potential for development:

The Tolles-Parsons Center

The Tolles-Parson Center is under construction, with projected completion in fall of 2017. This center will be the home for Wellesley's Council on Aging (COA) and its development will have a significant impact on how Wellesley serves its senior population. The Wellesley Free Library has a very strong partnership with the COA, co-sponsoring many programs that are held at the WFL. Examples include technology classes, lectures, and book groups. The COA anticipates that this partnership will continue and that there will be little change in the need for programming space at the main library building. The new COA building does not have a room comparable to the Wakelin Room at the WFL. The COA also believes that programs at the WFL attract a broader audience than programs held in a COA dedicated space. However, it is important that the WFL monitor this evolving situation, as the COA becomes more settled in its new home.

In May, the COA announced a major campaign to raise funds for furnishings and programs in the Tolles-Parsons Center, adding to the already competitive private funding landscape in Wellesley.

900 Worcester Street

In April of 2017, the town entered into a lease with Wellesley Sports Center, LLC to construct a sports facility at 900 Worcester St, consisting of two ice rinks, a swimming complex and an outdoor playing field. It is anticipated that this development will serve residents as well as people from the surrounding communities. The full impact of this major development on the Wellesley Free Library is unclear at this point. However, its location near the Fells Branch Library may provide some future opportunities for programming synergies, as well as shift the community's needs and expectations for hours/services from the Fells Branch Library.

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[7] Compiled from the websites of Babson College, Wellesley College, and Massachusetts Bay Community College.

North 40

The North 40, a triangular-shaped 46.8-acre parcel of land on the western side of Wellesley, is bordered by Turner Road, Weston Road, and the MBTA railroad tracks, and is adjacent to the Woodlands and Weston Road neighborhoods. The property was originally owned by Wellesley College and was purchased by the town of Wellesley for approximately $35.2 million in January 2015. About 30% of the purchase was made using Community Preservation Act funds, with the stipulation that 50% of the property remains open space under a permanent conservation restriction (which could allow active and/or passive recreational use). The remainder of the property can be used for municipal purposes, subject to some minor restrictions. Currently, the North 40 is home to the Community Gardens, some woodland trails, and a vernal pool, as well as a buried landfill that the town has agreed to mitigate.

While Town Meeting unanimously supported purchasing the North 40, largely as a defensive measure so that the town could control its ultimate development, as of August 2017 there is no agreement about how the land should be used. Initial "visioning" workshops found support for senior/affordable housing; a continuing care retirement community; a new school; synthetic turf recreational fields; additional walking trails (particularly to provide connectivity to 900 Worcester Street); retention of the community gardens; and/or establishment of a community farm. Other town residents prefer to keep the land undeveloped, providing important wildlife habitat and flood protection and groundwater recharging. A successor committee to the North 40 Steering Committee is expected to be appointed by the Board of Selectmen, charged with making recommendations on any future development.

Development of the North 40 could bring additional traffic to Weston Road, which might impact the Fells Branch, as well as the Main Library. It is unclear if specific North 40 development proposals would affect the WFL, but the library should monitor future plans for this property.

Wellesley Public Schools

Wellesley prides itself on having an outstanding public school system, with one high school, one middle school, seven neighborhood-based elementary schools, and one public preschool. The WFL has a strong history of partnering with the WPS (Wellesley Public Schools). The middle school and the high school provide the WFL with annual reading lists, allowing the WFL to keep its collection up-to-date for student use. To further support students, the WFL maintains a collection of textbooks and purchases specialized databases. The WFL also conducts outreach visits to the elementary and middle schools, and is a destination for students at all levels, particularly on "early release" school days.

P.A.W.S. (Preschool at Wellesley Schools) is the WPS play-based public preschool program for children three to five years old. At P.A.W.S., the focus is on the whole child—fostering growth in multiple domains: social, emotional, cognitive, and physical. Teachers at P.A.W.S. encourage students to actively engage in a developmentally appropriate environment that promotes learning-

through-play experiences. To support preschoolers, the WFL currently sponsors, in partnership with Communities United, a Wee Play and Learn program for young children to discover different concepts through interactions with books, games, manipulatives, and art. The WFL also holds weekly story and craft times for preschoolers at the Main, Hills, and Fells branches, and during the summertime, a WFL librarian hosts a special Beach Tales story time at Morses Pond geared toward younger children.

During the 2017–2018 school year, the WPS plans to expand its World Language program. Currently, children in grades K–2 learn Spanish. With the planned expansion, upper elementary students will also take Spanish classes. Having age-appropriate foreign language books for these students is a key WPS need.

English Language Learner (ELL) students are a growing demographic in the WPS. Since 2007, the average rate of growth has been approximately 4.5%. The rate of growth between 2016–2017 and the previous school year was 7%. As the schools work to provide resources for these students, the WFL has helped to support ELL parents through Wellesley ESL (English as a Second Language). Sponsored by the WFL, with support from other local groups, Wellesley ESL is an English language instruction program for adults, with classes ranging from beginner to advanced levels. Wellesley ESL also provides a Cultural Topics and News class, and a book group. The success of this program currently is very dependent on volunteerism and private funding.

The WPS has a strong emphasis on STEAM (science, technology, engineering, arts, and mathematics) in its curriculum. Moving forward, it is embracing both project-based learning and maker spaces: providing 3-D printers and other technologies in a collaborative workspace. To help foster further STEAM learning opportunities for students, the WFL purchased two interactive NAO robots in 2016. Students can learn coding to program the robots during weekly courses and in open lab time. The WFL offers other STEAM classes as well, such as Girls Who Code.

The WPS has a need for group meeting space for teacher and staff collaborations that the school buildings can't accommodate. Such meetings can include dozens of participants, who require laptop access and the ability to break into smaller groups. Recently, the WPS School Committee members have held "office hours" at the WFL's Main branch.

School budget restrictions have continued to impact the ability of the schools to purchase new library materials and technology. Currently, the school libraries rely heavily on private funds raised by the parent-teacher organizations (PTOs) and grants from the Wellesley Education Foundation (WEF).

For the past few years, the town has been engaged in deliberations over the rebuilding and/or substantial renovation of three of Wellesley's elementary schools: Hardy, Hunnewell, and Upham. As of June 2017, the Wellesley School Committee and the Board of Selectman plan to appoint and work with a School Building Committee, which will conduct a feasibility study and develop plans for rebuilding and/or extensively renovating at least two of those schools: Hunnewell, followed by either Hardy or Upham. Current plans for the two new schools call for 19 classrooms, matching the size of the Sprague and Bates schools. A third new school may be considered if the population of K–5 children begins trending upward (above 2,350 students). Both Hardy and Hunnewell are

located near WFL locations, the Fells Branch Library and the Main Library, respectively. While specific plans are still under consideration, the WFL should monitor progress and potential impacts on student/family library needs.

Our Supporting Organizations

The WFL receives approximately 15–20% of its operating expenses from private donations. The WFL is extremely fortunate to be supported by two outstanding organizations.

The Wellesley Free Library Foundation

The Wellesley Free Library Foundation is a private, nonprofit foundation supporting and enhancing the mission of the WFL. Its goal is to enrich, not replace, traditional tax-based support for the WFL through gifts, grants, and bequests from individuals and organizations while reinforcing the need for continued and increased public support for the library. The Foundation spearheads fundraising efforts to bridge the gap between the community's aspirations for the WFL and assets available from municipal sources.

In 2013, the Foundation merged with another supporting organization, The Centennial Fund. The Centennial Fund was founded in 1983 (on the WFL's 100th birthday) as a permanent endowment to "enrich and enhance" the basic town-funded materials collection. The Centennial Fund Endowment, which now stands at roughly $4 million, benefits from professional investment management and is overseen by an Investment Committee, including both Foundation and independent members. With approval from the Foundation's Board of Directors, the Fund allows the WFL to experiment and build collections that would otherwise not be possible, purchase exciting new databases and showcase evolving material formats.

Since the merger, the Foundation has granted between $200,000 and $275,000 a year to support a variety of enhancements. Notable projects included the purchase of two NAO robots, the introduction of Apple products to the library, and funding of the ESL, technology, and school outreach programs. Collection enhancements have included the addition of a Library of Things, numerous streaming services and databases and a digital version of *The Wellesley Townsman* from its inception through 1989. Foundation funds also maintained the operation of both the Hills and Fells branch libraries from fiscal year 2009 to 2017, when a significant portion of the operating budget of the Hills Branch was moved back into the town WFL budget. The Foundation still supports 100% of the Fells Branch operations and a portion of the Hills Branch operations.

The Friends of the Wellesley Free Libraries

The Friends of the Wellesley Free Libraries are dedicated to enhancing the quality of the library by providing services and programming not otherwise funded by the library budget. From museum passes and author lectures to quality programs for our youngest patrons, the Friends' support ensures that our library maintains its excellent reputation and serves our community at the highest level. Income generated by quarterly book sales and

memberships enable the Friends to serve the entire Wellesley community in a very meaningful way. A majority of the programming that the WFL provides to our patrons is funded through the generosity of the Friends, with an annual contribution of almost $40,000 to WFL operations.

Library Trends

When steel tycoon Andrew Carnegie donated funds to build public libraries in the late 1800s, he envisioned libraries as community gathering spaces. Some Carnegie libraries included music halls, billiard tables, bathhouses, and even bowling alleys.

Today, libraries remain leaders in creating space that welcomes community members and draws on patrons' desires for gathering, lending, and learning.

- **Library collections** – Libraries are one of a community's best renewable resources. Librarians analyze patron needs to provide communities with the most desired materials. Unlike 20 years ago, this now requires a constant monitoring of new material innovations so that libraries can provide not only multiple copies of best-selling books, but also e-books, downloadable audio, streaming video, and non-traditional items such as puzzles and telescopes. Change is constant. For example, according to an article discussing e-book trends in the professional journal, *American Libraries*, usage of e-books had a meteoric rise in 2008[8]. Nine years later, its usage has plateaued and, yet, e-books continue to make up almost a quarter of the book publishing market. Understanding the shifting needs of patrons requires continual diligence. Meeting these needs in a cost-efficient way requires resource sharing of materials that are of more specialized interest between libraries and seamless interlibrary borrowing for patrons.

- **Small group study spaces** – More project-based learning, an increasing number of people working from home or telecommuting, and people needing a place to study are trends that result in an increased demand for small group study spaces. Soundproof study spaces where groups can converse or conduct video/phone-conferences without disturbing other patrons have also become a necessity.

- **Large group meeting spaces** – As a community grows, so does its need for vibrant meeting places. Comfortable, clean, and centrally located spaces have always been in demand. The needs of community groups, non-profits, and municipal agencies have evolved to include the desire for large screen displays and wireless access for presentations, as well as technologically enhanced sound systems for collaborating or presentations to large groups.

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[8] Inouye, Alan "What's in Store for Ebooks." *American Libraries*, January 4, 2016.

- **Children's interactive learning spaces** – Librarians and educators know that young children learn through play. Cognitive benefits and academic success is reinforced when a library provides future students an environment that is conducive to play-based learning. As libraries renovate or build new facilities, interactive children's play spaces are almost always incorporated. Boston Public Library and Shrewsbury Free Public Library are two excellent examples of how libraries statewide are meeting children's educational needs through interactive learning environments.

- **Commons areas** – Regardless of the location—rural, suburban, or urban—access to technology at the library is expected and meeting the technological needs of patrons is a service priority. Laptops, tablets, and mobile devices have become ubiquitous, as has working on a device with a cup of coffee or tea close by. Public libraries from Seattle to New York have introduced "Commons Area" spaces with fast WiFi, where food can be consumed, and with flexible furnishings that can be reorganized as needed. A "commons" is a cultural or natural space accessible to all members of a society—a definition that fits the library well.

- **Breaking down barriers to service** – Smaller desks and better sight lines make access to staff welcoming, less intimidating, and facilitates an efficient and effective service environment. Technology has made access to instant digital reference service not only a possibility, but also a widely practiced service. Vendors provide specialized platforms for libraries, so that patrons, wherever they happen to be, can benefit from email, texting, and instant messaging reference service.

- **Technological service enhancements** – From automated materials handlers (AMH), self-checkout kiosks, RFID, wireless printing, and people-counters, to installing more plugs for patron devices, new technologies have become the standard for providing excellent service in libraries nation-wide. Technologies like these increase check-in accuracy, decrease the time it takes for items to get to shelves and patrons, and allow staff to be redeployed in higher level, direct patron service tasks.

- **Classes and programs** – Community members demonstrate a strong desire to continuously increase their knowledge about arts, politics, technology, and local and global culture. As technology continues to develop and the uses of technology multiply, the demand for technology classes grows with it. As new technologies emerge, such as digital assistants like Alexa, robotics, and even the 360-degree selfie, opportunities are created for new classes. As libraries continue to evolve, librarians respond by creating dynamic programs that meet these cultural and educational needs of patrons.

KEY CHALLENGES TO THE WELLESLEY FREE LIBRARY

Communicating effectively with our community.
Communication continues to be a major challenge for the WFL. It is increasingly difficult to capture the attention of our patrons and potential patrons. Only a small subset of the community reads the local newspaper. Electronic communication (email, social media, etc.) is inexpensive but is easily lost in a fog of competing messages. People are so busy that information is often desired only at the moment that it is needed. In addition, libraries' long standing tradition of guarding patrons' privacy further limits our ability to better inform library users. On a broader note, communication to Wellesley's residents is a challenge shared by all town departments and local businesses with no easy solution yet identified.

Providing consistent delivery of an excellent customer experience during a time of rapid changes in the library industry.
The ongoing evolution of technology impacts funding requirements and necessitates constant staff training. As a steady stream of employees move towards retirement, and the economy reaches "full employment," it is increasingly difficult to find the desired skills and abilities in individuals needed to fill vacancies. The use of smartphones and other mobile devices has dramatically changed the way patrons obtain information and how they view content. As technology changes, patrons' expectations of what a library should offer change as well. Patrons now expect libraries to provide materials in multiple formats, including e-books, and to provide access to alternative technologies. At the same time, the publishing industry is undergoing a sea-change which directly impacts library services. Libraries must adapt to changing distribution models, lack of clarity surrounding copyrights and fees for electronic material, and the unreliable quality of increasingly accessible self-published works.

Keeping our building design current to address the changing needs of our patrons.
Since the Main Library building opened 14 years ago, library usage has evolved considerably. The library has seen a significant increase in requests for meeting space. There is a greater need for both group meeting and small teamwork spaces. Recent enhancements have allowed the library to expedite materials checkout, but improvements are needed when materials are returned. Meanwhile, social norms regarding food consumption and the amount of noise that is acceptable have changed significantly. We strive to meet the needs of Wellesley's students as the schools have moved towards more cooperative assignments and more technology-based learning models. To complicate these challenges, we have found that patrons have differing ideas about how libraries should be used today.

Continuing to provide exceptional library services in an uncertain funding environment. For many years, the Wellesley Free Library has operated successfully under strict financial conditions as town budget guidelines were issued at level or near level funding for both our capital and operating budgets. This has impacted our ability to hire additional staff and make necessary investments to meet increasing library usage and changing patron needs. There is no indication that tax funded budgets will increase substantially in the foreseeable future. In fact, uncertainties at both the state and federal level suggest a continued period of fiscal restraint. The gap between "core services" (funded through tax dollars) and the services that make WFL the outstanding library that the Wellesley community demands has been closed through increased private

donations. However, no matter how generous the level of private support, there is an inherent risk in being dependent on private funding. There are many worthy causes, organizations, and other town departments competing for the same donors.

Creating greater definition and understanding of the role of Fells Branch Library.
In 2008, the Wellesley Hills Branch Library and the Fells Branch Library were reopened with much excitement. For eight years, the operations of both branches were funded through private donations. The Hills Branch Library has now solidified its role in Wellesley as an intimate "reading room" and charming gathering space for residents, evidenced by the April 2017 vote at Town Meeting to reintegrate the cost of much of its operations back into the overall tax-impact budget for the WFL. However, the Fells Branch Library operations remain entirely supported by private dollars. It is now important to clearly define and articulate the unique mission of the Fells Branch Library, so that it provides the best value possible to the residents of Wellesley.

THE STRATEGY

Strategic Goals

In order to address the above challenges and in accordance with the mission of the WFL, the Trustees of the WFL have created the following strategic goals. (Key Wellesley Values supported are listed in italics after each goal.)

Strategic Goals (in no specific order):

I. Enhance usage of space within the library buildings to support the WFL as a community gathering place and cultural destination *(Diversity, Sense of Community, Town Character, Town Asset Management)*

II. Refine communication strategy to better educate the community on WFL offerings and to promote free and convenient access *(Education, Collaboration, Transparency, Democratic Government & Citizen Participation)*

III. Build a flexible, fearless, and fun workforce, supported by strong operational processes and systems, in order to provide exceptional library services *(Collaboration, Excellence in Service Delivery, Best-Practice Implementation)*

IV. Expand offerings to meet the evolving needs of residents so that the WFL continues to be a gateway to ideas and an intellectual crossroads for the community *(Education, Healthy Lifestyle, Conservation & Sustainability, Collaboration, Diversity, Democratic Government & Citizen Participation)*

V. Maximize innovation and technology to enable the WFL to be a leader among public libraries *(Town Asset Management, Excellence in Service Delivery, Best-Practice Implementation, Conservation & Sustainability)*

Strategic Initiatives

The following strategic initiatives support the WFL Strategic Goals outlined above. The Library Trustees have approved the priorities of these initiatives. (Within each priority, the bullets are in no particular order.) It is up to the Library Director to determine the most effective timing for development and implementation of these initiatives, as well as the costs associated with each and potential funding sources. The Library Director's action plan will be approved annually by the Trustees and subsequently submitted to the Massachusetts Board of Library Commissioners.

GOAL I: Enhance usage of space within the library buildings to support the WFL as a community gathering place and cultural destination

A. *Fully Utilize Main Library in Order to Reflect and Meet Changing Needs:*

Level I

- Provide additional small conference rooms/study space

- Create a "Commons Area" where people can meet, talk, and consume food or drink

- Upgrade the Children's Room and incorporate a "hands-on learning space"

Level II

- Provide additional meeting and quiet study space for users

- Update Quigley Room for current Middle School students' needs

- Evaluate opportunities to provide additional library designated parking

- Continue to provide spaces that respect the need for varying noise levels

Level III

- Explore the "café concept" – the ability to purchase food and drink

- Update Teen Room for current High School students' needs

B. *Leverage Space at the Hills Branch Library:*

Level I

- Promote Hills Branch as a meeting space (as is)

Level II

- Consider furnishings that would allow for "quick conversion" for meetings

Level III

- Consider modifying the Hills Branch to allow for meetings while the library is open

C. *Revitalize the Fells Branch Library:*

Level I

- Create a dedicated integrated learning space for children at the Fells Branch

Level II

- Establish a children's garden on the green space next to the Fells Branch for public use

- Explore options for increased patron access to the Fells Branch (parking and/or transportation)

GOAL II: Refine communication strategy to better educate the community on WFL offerings and to promote free and convenient access

A. *Enhance Marketing Effectiveness*

Level I

- Hire a marketing professional to develop an integrated strategy for the WFL and its supporting groups, exploring hours required, opportunities for resource sharing and possible funding sources.

Level II

- Publicize library services and events through the channels used by other municipal departments and community groups

- Refine social media strategies

- Better educate the community concerning the library's use of public vs. private funds

- Increase distribution and effectiveness of newsletter

Level III

- Continue to work closely with Wellesley Public Media to make public meetings and library programs more easily accessible for residents

B. *Expand Direct Patron Orientation and Outreach*

Level II

- Further develop a method for patrons to recommend topics for programs and/or training sessions

- Expand library focused presentations to community groups both in the library and in the community

Level III

- Enhance library orientation tours/sessions for new card holders

- Expand use of a program evaluation form at all library programs and events

C. *Enhance Communication Across Town Departments*

Level I

- Brief the Board of Selectmen on library activities and goals at least once a year, outside the budget process, to create better understanding of WFL priorities.

- Meet with strategic partner boards at least once a year, including School Committee Recreation Commission, and Board of Selectmen/COA Board, to facilitate collaboration on programs and services.

Level II

- Work with the town and other groups to develop a town-wide events calendar for community groups to post events

GOAL III: Build a flexible, fearless, and fun workforce, supported by strong operational processes and systems, in order to provide exceptional library services

A. *Be an Employer of Choice Among Libraries*

Level I

- Enhance the technical capabilities of all staff and improve the number of highly trained staff available to assist patrons with technology issues at all times the library is open

- Enhance employment opportunities to make them more attractive (e.g., adjusting hours, compensation, responsibilities, or benefits)

- Provide customer service training for library staff on an annual basis

- Provide opportunities for staff to develop new skills by attending conferences, seminars and other professional development activities

- Continue to hold regular departmental meetings

Level II

- Foster relationships with those exploring a career as a public librarian

- Explore concept of holding an annual all staff meeting to enhance communication and team building (library may be closed)

B. *Foster Patron-Focused Service and Implement Best-in-Class Customer Service Models*

Level I

- Consider new service models as they evolve

Level II

- Continue to provide a method for patrons to express their suggestions

- Encourage staff to recommend topics for community training sessions

Level III

- Explore "Library Ambassador" concept to ensure patrons receive their desired level of individualized service

- Explore offering "Concierge" service to assist with information specific to Wellesley

C. *Optimize Use of Staff*

Level I

- Provide enhanced technology support at all times the library is open

- Utilize technology, systems, and outsourcing to free up staff for higher value activities

- Review and revise all job descriptions to reflect changes in library service

- Revise performance evaluation for staff to improve staff understanding of job expectations as a method of improving job satisfaction

GOAL IV: Expand offerings to meet the evolving needs of residents so that the WFL continues to be a gateway to ideas and an intellectual crossroads for the community

A. *Leverage Partnerships in Creating Offerings:*

Level I

- Continue existing partners with outside groups when possible to enhance program options
- Deepen partnerships with the WFL supporting organizations
- Partner with municipal departments to coordinate offerings

Level II

- Leverage existing relationships and build new connections with local colleges to offer programs and activities

Level III

- Explore increased use of Simons Park for outdoor library activities

B. *Enhance Current Offerings*

Level I

- Expand the number e-books available
- Provide more STEAM programs that prepare children for the future
- Expand technology training with additional outside teachers and new topics for classes

Level II

- Expand the "Library of Things" – a non-traditional collection of items for loan
- Offer patrons additional suggested reading/listening/viewing recommendations tailored to their interests
- Increase display space and continue to regularly update displays
- Expand world language collections (books written in languages other than English)

Level III

- Enhance curriculum tie-ins to school age programs
- Increase availability of discounted museum passes
- Provide programs and resources that help parents prepare for the future

C. *Explore New Areas for Programs and Services*

Level II

- Explore the possibility of allowing alcohol to be served at certain events – e.g., Brew and Browse or a fundraising event

- Provide additional family-oriented, community-building events like scavenger hunts

- Offer an increased number of adult arts and crafts programs

- Provide information systems to help patrons with citizenship questions, or find public health information

Level III

- Offer Repair Café events where people meet and repair things together, such as clothes, furniture, small appliances, and toys

- Offer STEAM programs for adults

GOAL V: Maximize innovation and technology to enable the WFL to be a leader among public libraries

A. *Invest in Systems That Increase Efficiency*

Level I

- Install an automated materials handling unit to facilitate the discharging of library materials and thus free up library staff for higher value tasks

- Establish an "intranet" to enhance communication within the library staff

- Maintain the highest level of computer network performance

Level III

- Explore possibilities for making it easier for patrons to pay for printing and other services

- In cooperation with the MLN, work to improve the web interface used by library patrons

B. *Enhance Technology Services to Patrons*

Level I

- Continue to provide access to new databases and other electronic information sources as they become available

Level II

- Simplify the method of reserving a meeting space and/or museum pass

- Add audio-enabled, integrated narration children's books

Level III

- Provide additional means to view and listen to digital content in the library

C. *Explore and Implement Innovative Initiatives*

Level I

- Create an innovation team to evaluate and recommend new technological opportunities
- Encourage staff to investigate the incorporation of new technologies into the library's service model
- Explore feasibility of offering the use of a 3D printer
- Explore a texting service for patrons to communicate with librarians

Level II

- Evaluate the need for virtual reality devices and programs
- Evaluate the need for a "maker lab" including devices such as a 3D printer, a laser cutter, or a Raspberry Pi (see http://www.barringtonarealibrary.org/makerlab for other examples)

Level III

- Evaluate the need for a media lab where patrons can access computers with editing software, cameras, microphones, musical keyboards
- Evaluate the need for digital media maker programs and equipment for movie-making/editing
- Purchase and utilize a "Book Bike" for outreach at community events and to target low-mobility residents

CONCLUSION

Consistent with the findings of the previous strategic plan, the Wellesley Free Library remains an excellent, well-run, and highly professional institution. It has outstanding buildings, collections, and programs. The Strategic Planning Committee objectively studied the Library's strengths and challenges. The purpose of this strategic plan is to continue building on these strengths while also addressing areas and opportunities for growth, expansion, and improvement.

Despite the efforts that went into this plan, it is important to recognize that future success is

> *"WFL meets my needs and desires as well as those of my daughter, her husband, and their three children. If we cannot find the books, media or things we are seeking, there is always a friendly and knowledgeable librarian or staff member who will answer our questions, guide us in our search and almost always satisfy our requests for help. The technology and robot classes and events led by professional and nonprofessional staff members are uniformly user friendly and truly outstanding. The programming for adults, young adults, seniors and especially for children is incredibly diverse, entertaining, fun, informative, and excellent."*
>
> *– Survey participant*

contingent on the library being both **strategic** and **opportunistic** when evaluating specific initiatives. The strategic plan is meant to provide direction; it is not a path "written in stone." **If an unanticipated opportunity presents itself, the critical question is not, "Does it fit into our strategic plan?" but rather, "Does it fit with our mission, vision, and values?"**

Wellesley Free Library Strategic Planning Committee
Ann-Mara Lanza, Library Trustee, Committee Chair
Ann Rappaport, Library Trustee
Diane Savage, Library Trustee
Beth Sullivan Woods, Former Library Trustee
Jamie Jurgensen, Library Director
Elise MacLennan, Library Assistant Director
Emma Weiler, Library Supervisor, Children and Teens
Pearl Der, Library Supervisor, Circulation
Darcey Bartel, WFL Foundation
Heather Sawitsky, WFL Foundation
Jennifer Siedman, WFL Foundation, Director of Development
Susan Calcio, Friends of the Wellesley Free Libraries, President
Tanya Auger, Patron
Peg Tso, Patron
Robin Brett Wechsler, Patron
Chuck Flaherty, Consultant
Approved, 9/11/2017

APPENDIX A: Computer Usage Survey

Summary

The purpose of this survey was to collect information on how our patrons are using our computers. The survey was completed by 90 patrons. Almost half of the respondents reported using WFL PCs once a week or more frequently. The survey showed that:

- On average, patrons planned to engage in at least 3 different behaviors using WFL computers.
- The major uses of the WFL's computers, beyond catalog access, are: Accessing email, Internet browsing and Word processing. In terms of future usage, the average patron indicated that are likely to use the WFL PCs for 4-5 behaviors.
- Both PCs and Apple computers are valued by patrons.

Results

How often you use the public computers at the Wellesley Free Library? (Choose the response that reflects your best estimate)

Answer Options	Response Percent	Response Count
A few times a week	31.1%	28
About once a week	17.8%	16
A few times a month	12.2%	11
A few times a year	14.4%	13
About once a month	10.0%	9
Every Day	10.0%	9
This is my first time	4.4%	4
Once a year	0.0%	0
Other (please specify)		2
answered question		90

Which of the following do you prefer to use for your projects?

Answer Options	Response Percent	Response Count
Apple iMac	24.4%	22
PC (Windows based)	58.9%	53
Other (please specify)	16.7%	15
answered question		90

How are you planning to use the Library computers today. Select as many answers as you need.

Answer Options	Response Percent	Response Count
Access email	65.6%	59
General Internet browsing	40.0%	36
Access Library Catalog	38.9%	35
Other Activities	27.8%	25
Use Word processing or Spreadsheets	21.1%	19
Use Google Docs	16.7%	15
Use a flash drive	14.4%	13
Access subscription Databases	13.3%	12
Use social media	12.2%	11
access Youtube videos	11.1%	10
Download or listen to music	8.9%	8
Download or read e-books	5.6%	5
Use Powerpoint	5.6%	5
Participate in online classes	4.4%	4
Use Photoshop	3.3%	3
Play Online games	3.3%	3
Take an online test	3.3%	3
Download or watch streaming video	3.3%	3
Use an SD or Flash card	1.1%	1
answered question		90

Which of the following do you foresee using in the future. Select as many choices as you need.

Answer Options	Response Percent	Response Count
Access email	65.6%	59
Access The Library Catalog	63.3%	57
General Internet Browsing	58.9%	53
Use word processing or spreadsheet software (MS Word or Excel)	32.2%	29
Access Subscription Databases	27.8%	25
Use Google Docs	26.7%	24
Use a flash drive	26.7%	24
Participate in online classes	21.1%	19
Use social media	18.9%	17
Access YouTube videos	18.9%	17
Download or read e-books	17.8%	16
Take Online Tests	15.6%	14
Use Photoshop	14.4%	13
Use Powerpoint	12.2%	11
Download or listen to music	11.1%	10
Play Online Games	10.0%	9
Other	10.0%	9
Download or watch Streaming Videos	8.9%	8
Use an SD card	4.4%	4
answered question		90

APPENDIX B: Focus Groups and Interviews

Focus Groups:
1. Patrons
2. Town Meeting Members
3. Civic Organizations

Interviews:
1. School Department: David Lussier, Superintendent; Joan Dabrowski, Assistant Superintendent
2. Recreation Department: Bettina Eikeboom, Commissioner; Matt Chin, Director
3. Council on Aging: Diane Campbell, Board of Directors Chair; Gayle Thieme, Director
4. Board of Selectmen: Marjorie Freiman, Board of Selectmen, Chair; Blythe Robinson, Executive Director of General Government Services

Summary of Sessions (SOAR Format)

Strengths

Customer service and quality of staff—public appreciates being treated well
Programs—especially children, tech training, and cultural
The building—people love it, #1 place to hold a meeting
Collections—books and more, appreciation for MLN ILL
Cooperation with other groups—schools, COA, Historical Society, Wellesley Media
Exhibits and displays—art in lobby and books inside library
Internet access for all
ESL and delivery to the homebound
Jackie's Room and technology education

Opportunities

Improve PR—many are not aware of the scope of services being provided
Improve parking—mentioned by every group, but not Town departments
Café—or at least a place to eat
Collections—add more foreign language, more multiple copies, e-books, Blu-ray video
Consider developing YouTube instructional and cultural videos and podcasts
More cooperation with outside groups to develop programs
More meeting space: one person suggested converting underground parking space, branches?
School Department would like a WFL staff person to focus exclusively on schools
Improve Wi-Fi
Expand ESL program
Several mentioned added hours—no consensus on when or where
Technology—good, but need to stay current
Meet with BOS annually, outside of budget cycle

Aspirations

Improved access to meeting space

Collections—more responsive to patron needs
A community more fully aware of library services, and thus more library usage
A library café or at least area to eat and chat
Consider developing a community calendar
Continued emphasis on customer service, more emphasis on staff retention; several staff feel high fines upset patrons, 4Cs—Care, Community, Collections, and Connection
To be quicker to respond to trends and tech developments—more back room support
Greater collaboration with outside groups
More tech savvy staff to assist patrons—and to assist staff with problems
Some want better communication between staff, administration, and Trustees

Results
Use evaluation forms at end on library programs
Conduct surveys

APPENDIX C: Patron Survey

Objectives

To assist the WFL strategic planning process by obtaining input from the community by gaining better understanding of:
- Overall perceptions of the WFL
- Priorities for the future
- Reactions to potential changes to offerings
- Patron knowledge of funding sources
- Communications channels used/valued

This online quantitative study was conducted during mid-April through early May. Participation was encouraged through online distribution to key constituency lists (WFL subscribers, WFL website, Town Meeting Members, Wellesley News & Announcements, PTOs, COA, NRC, etc.)

A total of 1,082 individuals participated in the survey. The sample of this study is very strong and represents a good cross section of the town's demographics as well as its geography.

Key Findings
- **Satisfaction is very high across all constituencies**
- Key challenges and opportunities for the future that were observed included:
  - Space utilization (meeting space)
  - Marketing and education
  - Role of staff as ambassadors
- Browsing opportunities and support finding appropriate materials are valued
- Tension around "quiet" atmosphere and concerns around protecting collection size
- Knowledge about the digital collection appear limited and in need of development
- Digital literacy training is valued and needed; how to reach those that are not currently engaged?
- Need to address expectations around WFL as a meeting place and group workspace, including perceived need for more informal workspace and meeting space
- Education needed about impact of donations/how private funds enhance the WFL experience
- Broad definition of core services from the patron/resident perspective suggests that the WFL may want to revisit the definition of core over the coming years. More is considered "core" by patrons then is currently funded through the tax-impact budget.
- Marketing and education represent a key opportunity and should be a priority area (limited knowledge of highly valued services)

Selected Data
- 89% of respondents feel that the WFL strongly meets their needs
- 91% of respondents feel the current hours meets their needs
- An overwhelming majority of respondents feel that the WFL:
  - Is always clean and neat (92%)

- o Provides exceptional library services (87%)
  - o Has professional and helpful staff (86%)
  - o Is very well suited to the needs of adults (82%)
  - o Is innovative in its offerings (67%)
  - o Is very well suited to the needs of children (65%)
  - o Is a great place to study/get individual work done (64%)
- High levels of interest in expanding the availability of informal work and meeting space:
  - o 53% said they would use an "informal meeting area…similar to a café" where conversations and food/drinks are allowed
  - o 49% said they would use a coffee shop/snack area in the main library
  - o 34% said they would use a "maker space"
- Patrons do not want roaming staff who will approach them to provide support (84%), preferring to seek support from "help desk or resource" areas
- Patrons want the library to prioritize community groups over town boards and committees when allocating meeting space (91%)
- There is tension around key atmosphere issues, indicating the importance of balancing a range of patron needs: Patrons are fairly evenly split on seating space vs. shelving for the collection (54% vs. 46%) and quiet space vs. low-level discussions (57% vs. 43%)
- Difficulty in booking space is a significant factor in how often patrons meet at the library. (58% would use the library more often for meeting if they could book space.)
- Patrons are not familiar with sources of funding for WFL (26%-50% "don't know" how specific areas are funded)
- The majority of information about the WFL and its offerings is received directly from the WFL rather than any external communication vehicle: 55% of respondents get information about library programs from the WFL e-newsletter; 47% via library flyers/posters; 41% via the WFL website. The Wellesley Townsman is still the best outside method of communication to current and potential library users

APPENDIX D: Observation Study

Overview of Key Findings

- Over a four-month period, a total of 7,325 observations in the Main and 283 observations in the Hills were recorded.
- Demographics:
  - Equal mix of males and females at the Main Library, although seniors were more likely to be male (66% male vs. 33% female) and teens were much more likely to be female (62% female vs. 38% male)
  - The Hills Branch had a heavy skew to females (81% female in total); all individual age groups were also strongly skewed female
  - The vast majority of observed visit behavior was adult.
    - Almost 8 out of 10 observations were adults in each location (with roughly 1/3 being seniors and 2/3 being non-senior adults).
- Main Library Space:
  - Primary spaces were tables/studying/meeting (46%), Wakelin entry (18%), and Children's Room (35%); Periodical Room was strongest of other audited spaces (5%). Media Room (3%) and Stacks (3%) had relatively low usage given their footprint.
  - More than half of the observed use was study/work/meeting space (46% tables/studying/meeting, 5% Periodical Room, 2% High School Study Room, 1% Youth Room).
- Main Library Behavior:
  - Single largest behavior was using a computer device (37%), with 21% using a mobile computer/device and 16% seated at a WFL computer.
  - The second highest behavior was some form of social/group interaction (30%), with 26% interacting with others and 15% attending programs.
  - The third highest behavior was using the collection in some way (24%), with 10% reading, 9% browsing, and 5% researching/studying/writing.
  - When analyzed by age, seniors and adults were most likely to be engaged in the usage of a computer/device, while teens and children were most likely to be interacting with others.
- Hills Library Behavior:
  - Usage patterns were different than at the Main Library, with a heavier emphasis on social/group interactions (45% vs. 30% at Main) and using the collection/browsing (31% vs. 24% at Main); usage of computers was lower (15% vs. 37% at Main).

Key Considerations

- Although the WFL serves all demographics, adults are a dominant user group. Adults may be using the library for their own needs or to support their family's needs.

- This adult audience's single largest use involved computer interactions. Having sufficient PC access as well as appropriate bandwidth is critical. Technology support and resources will continue to be important to support this behavior.
- Interacting with others was highest among children's and teens. Providing spaces that support this activity in a productive way will be beneficial.
- Consistent with the patron study and room reservation history, observed space utilization suggests that use of study spaces/meeting areas is high and opportunities to identify additional meeting space could be productive in meeting expanding pressure for space. The Media Room appears under-utilized given its size.
- Browsing the book stacks in the adult collection has become a relatively non-existent activity. This may reflect patrons placing holds for desired items at home. They primarily only browse the high demand and new materials area.
- Browsing is significantly higher at the Hills Branch and the reasons for this should be explored to assist in leveraging the activity at the Main Library.
- Usage patterns support the fact that Hills Branch is meeting a different need in the market than the Main Library