Wellesley Free Library Strategic Plan

2024-2028

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INTRODUCTION

The Wellesley Free Library (WFL) is a treasured Wellesley resource and a leader among public libraries. The recently renovated Main Library is located in the center of town. Two branch libraries, the historic Hills and the child-centered Fells, are located at the east and west ends of town, respectively. In addition, the library hosts a robust website that serves as a "virtual branch." In 2022, *Library Journal* designated WFL a "Star Library." Only 258 libraries in the entire country received a Star Library rating.

Snapshot: Wellesley Free Library

July 1, 2021–June 30, 2022*

- 517,471 items were checked out or renewed. 376,718 of items circulated were books.
- There were 335,000 visits to the website.
- 173,283 people of all ages walked through the doors, each with an individual reason for visiting.
- The collection includes 158,886 books, 17,870 DVDs, 14,375 music CDs and audio books, and 76,244 e-books and downloadable audio books.
- 27,237 questions were answered by staff members via phone, email, and through the website.
- 20,184 Wellesley residents have library cards.
- 7,510 children, teens, and adults attended 550 live and/or virtual programs including story-time, craft, and computer classes.
- 3,167 hours were donated by 77 volunteers to teach in the WFL's ESOL program (formerly known as ESL) and provide other important support activities.
- The Library subscribes to 116 magazines and 36 locally owned databases.
- The Library is open 7 days a week.

*The Main Library closed from April to November 2021 for renovation. A temporary library located at 50 Central Street was open until September 25. The branches re-opened to patrons in April 2021 following their closure in March 2020 because of Covid-19; the Commonwealth lifted pandemic capacity restrictions in May 2021.

Residents of Wellesley are generally well educated and economically affluent, with high expectations for their library. The WFL strives to meet the needs and expectations of the community through open communication, diverse outreach, regular collection and evaluation of customer feedback, and continual improvement.

An interior renovation that transformed the Main Library to better meet the needs, enhance the experiences, and enrich the lives of the Wellesley community was completed in the fall of 2021. A

Commons room, nine new meeting rooms, a wonder-filled Children's Room and spacious areas to browse, work and play all elevate the exceptional library service that places Wellesley Free Library at the heart of the community.

Although society was thrown into chaos during the pandemic, the previous Strategic Plan kept the Library on track and was an invaluable roadmap for moving ahead.

> *"One place that serves people from birth through old age"*
> *"Forward thinking"*
> *"I go to learn about technology, things I do not know anything about"*
> *"A place of discovery"*
> *"It's free!"*
> *"Enduring value"*
> *"Open mindedness and inclusivity - a safe space for marginalized folks"*
> *"Innovative library spaces and patron-oriented service"*
> *"Library has always dared to try something new"*
>
> –SOAR (Strengths, Opportunities, Aspirations, Results) participants

Residents clearly value the Library's materials collections, physical spaces, state-of-the-art technology, relevant and entertaining programs, artistic displays, and up-to-the-minute access to information through its website. The WFL looks forward to continuing to anticipate future needs and expects to remain successful, useful, and relevant.

The goal of the WFL for the next five years is to maintain the high levels of services to which its patrons have become accustomed and continue to evolve to keep pace with changing needs and expectations. This strategic plan is intended to provide guidance for the next round of decisions about future directions for the WFL and ensure that they are made based on patron needs as those evolve.

Purpose of the Strategic Plan

Planning imparts a clear guide to ensure the Wellesley Free Library's activities and utilization of resources support its mission and vision. This Strategic Plan offers a blueprint for the library to use to reach its specific goals and achieve its intended results while addressing priorities. Ultimately, it will help Library staff, administration, and Board of Trustees make sound decisions and provide innovative services with equitable access. This is the second strategic plan created under WFL's Library Director Jamie Jurgensen, and as such, it continues to give the community insight into how the WFL can best serve Wellesley.

This plan is the successor to the [Strategic Plan for the Wellesley Free Library, 2019–2023](#).

BACKGROUND

Strategic Planning Process (Methodologies)

The development process for the WFL Strategic Plan 2024–2028 has been extensive. In preparation, the WFL Trustees reviewed and revised the mission and vision statements of the WFL. The Strategic Planning Committee (SPC) and the Strategic Planning Committee Core (SPC Core), a subset of the SPC, were formed in the fall of 2022, with the goal of creating a comprehensive plan to guide the library through the next five years. The first formal meeting of the SPC was held in November 2022. The SPC consisted of representatives from the Library Trustees, administration and staff, supporting organizations (the Wellesley Free Library Foundation and the Friends of the Wellesley Free Libraries), and patrons. The SPC Core consisted of three Library Trustees and the Library Director.

SPC work began with discussion about the previous strategic plan and a timeline for completion of the new plan. The SPC held monthly meetings to discuss ideas and share thoughts about what type of information was needed and how to source it. SPC members provided input on the community survey, completed a community mapping process to determine candidates for interviews and focus groups, reviewed the Library's mission, vision, and values, and reviewed a draft of the plan. As the WFL is a public library largely funded through tax dollars, the SPC made great efforts to include the public in the planning process.

Quantitative Patron/Resident/Staff Survey and Observational Study:
Next, the SPC 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 format throughout the Main Library and branch libraries. It was widely publicized through the e-newsletter, social media, emails, and notices using contact lists of key constituency groups (email and postings by Wellesley High School Evolutions program partners, Town Meeting members, Town news and announcement list serve, and other town departments) and was also translated into Chinese. The survey was available for three weeks in January 2023 and 610 individuals responded. Concurrently, WFL staff participated in a SOAR Assessment to determine the Library's Strengths, Opportunities, Aspirations, and Results. Additional information was gathered through an observational usage study conducted by trained staff members. Patron activity was observed and recorded at specific times of day between February and May of 2023. A total of 5,723 observations of patron activity were recorded at the Main Library.

Focus Groups and Interviews:
To obtain input from the WFL's many constituencies, the SPC held two "Town Halls" (everyone invited), completed 22 interviews, and conducted three SOAR focus groups (specific community members invited) in February 2023. The SOAR focus groups were for the SPC, the Wellesley Free Library Foundation and the Friends of the Wellesley Free Libraries. Town Halls were led by a consultant. Interviews and focus groups were led by members of the SPC. Participants were chosen through a community mapping process, which allowed the SPC to identify diverse groups in the community with which to speak in more detail. After the groups below were identified, SPC members contacted individuals representing each group to request interviews. The interviewees fell into the following categories:

- Groups or community members with barriers to library access
- Systemically marginalized groups

- Representatives from town government
- Educational representatives
- Community organizations
- Older residents/age-representative groups
- Support organizations/community members well-connected to the library

This qualitative research provided valuable insights that complemented the quantitative patron survey and the observational usage study.

In April, the SPC Core ranked the action items that were identified during the interviews, surveys, and SOAR exercises. Based on the Core's work, the Library Trustees and the Library Director discussed and fine-tuned a list of five-year goals and objectives for the WFL. The document was then reviewed and revised by the SPC at an April meeting.

The final report of the SPC was submitted to the Library Trustees for approval in June 2023.

> *"The environment is warm, comfortable, and elegant. The staff is always trying their best to help. The different functional areas are well divided and independent of each other. The library's offered service is rich and with great diversity."*
>
> –SOAR assessment group participant

Mission, Vision, Values of the Wellesley Free Library

Following pandemic-driven service transformations, the building renovation, and a good deal of thoughtful discussion, a new mission statement was adopted which encapsulates the value and the promise of the Library in the community. The Library's vision and values statements were similarly updated.

MISSION:
Connecting our community to each other and to the world

VISION:
The vision of the Wellesley Free Library is to be the cultural and intellectual crossroads of the community.

VALUES:
We SERVE as a community gathering place, cultural destination, and gateway to ideas.

We PLEDGE to be welcoming and responsive to our patrons.

We ENSURE a culture of belonging and build equity within the community.

We PROMOTE universal access to knowledge and ideas.

We INSPIRE lifelong learning.

We ENRICH our community through diverse programs and offerings for all ages.

We DEFEND intellectual freedom and user privacy.

We ACQUIRE materials responsive to community needs and desires.

We PRACTICE ethically and fiscally responsible stewardship of public and private resources.

We EMPOWER our employees to create a culture of curiosity, creativity, and innovation.

We INVEST in our employees' professional development.

We COMMIT to excellence in our services, facilities, and collections.

We APPRECIATE our support organizations whose generous gifts provide enhancements for all patrons.

We COLLABORATE with other Town organizations and institutions.

We ENCOURAGE staff, Trustees, and volunteers to be fearless, flexible, and fun.

We ADAPT, we LEAD, we TRANSFORM.

OUR COMMUNITY

Town of Wellesley

This Strategic Plan provides a road map for keeping the WFL on mission so that "connecting our community to each other and to the world" is central to everything the Library endeavors to accomplish.

In order to assess how accurately the WFL is achieving its mission, it's helpful to know the composition of the community of Wellesley. Drawing information primarily from data released by the U.S. Census Bureau in its 2020 Census Survey report on Wellesley and on the *World Population Review*'s 2023 profile of Wellesley (which makes mathematically reasoned projections based on data from the most recent Census Bureau survey report), we are able to provide this portrait of the community of Wellesley as it exists currently.

Since 1881, when the region formerly known as West Needham became the independent town of Wellesley, Wellesley has been—and remains—a leafy, safe, affluent suburb of Boston, where a majority of residents are highly educated and professionally employed. Lying thirteen miles west of Boston, Wellesley occupies a region of 10 square miles. In 2020, the Town had a population of 29,550, which was 5.6% greater than the population reported ten years earlier in the 2010 Census report. For many reasons, including offering a world class library, the Town of Wellesley continues to attract new residents—especially families.

Of that population of 29,550, the median age of Wellesley residents is 34.8 years old, quite a bit younger than the Commonwealth's median age of 39.6. This is due, in part, to the fact that a hefty 25.1% of the town's population is of school age (younger than 18 years old). At the other end of the age spectrum, a more modest 14.2% of the population is of "retirement age" (65 years and older). More women (56.7%) than men (43.3%) reside in Wellesley, and over half (53.6%) of the town's residents are married. The population of Wellesley is overwhelmingly white (78%). A vast majority of the town's residents were born in the United States (82.5%). And according to the *World Population Review*, a surprisingly high percentage of that population was born in Wellesley (42.8%).

But increasingly, Wellesley has become—and is becoming—more racially diverse. Currently, 17.5% of the town's population is foreign-born and 13.2% of the population is Asian (including 8% who are Chinese, 2.6% who are Asian Indian, and 1% who are Korean). People of mixed-race background comprise 5.7% of the town's population, nearly 5% of the population is Hispanic/Latino, and almost 3% are Black/African

> *"It is important because it is a safe space for children to develop interest in books, learning, and community. The children's section is phenomenal. Great staff, resources, activities for all ages. In-person interaction is critical for young children; this library promotes that. Thank you!"*
>
> –SOAR assessment group participant

American. While 80% of the town's residents speak only English at home, nearly 20% speak a language *other than* English at home. Nevertheless, it is a small 3% of Wellesley households that get by with only "limited English ability."

In addition to the 2020 Census report, Wellesley Public Schools collects data on the number of families who report speaking languages other than English when enrolling. The most commonly reported spoken languages other than English, in descending order, are Chinese, Spanish and Korean. Other languages spoken by WPS families include Tamil, Persian, Dutch, Turkish, Chechen, Ukrainian, Sign languages, Mapuche, Swedish, Malayalam, Mandarin, Urdu, Greek Modern (1453–), Czech, Gujarati, Nepali, Nahuatl, Abkhaz, Japanese, Telugu, Kazakh, Vietnamese, Ewe, Caucasian, Australian languages, Amharic, Romanian, Aragonese Spanish, Afrikaans, Danish, Hindi, Arabic, French, Portuguese, German, Italian, and Achinese.

The population of Wellesley is highly educated. Of residents 25 years and older, 85% have a bachelor's degree or higher, including 52.4% who have at least one graduate degree. Among Wellesley's 3-17 years old residents, nearly 80% go to public schools while 20.3% attend private schools. Of those Wellesley residents 25+ years old, nearly the entire population of the town—98.1%--holds a high school degree, and 96.1% of Wellesley households own at least one computer.

According to the *World Population Review*, the cost of living in Wellesley is 98% higher than the national average, and the cost of housing for a year is 324% above the national average cost of the same ($22,624, according to the Bureau of Labor Statistics). There are 9,033 units of housing in Wellesley, of which 8,688 are occupied. About 83% of Wellesley residents own their own home, and as of March 31, 2023, Redfin reported that the average cost of a home in Wellesley is $1,689,375.

There are a total of 8,668 "households" in Wellesley, in which reside an average number of 2.8 people with 6,014 of Wellesley's households including a married couple. In those households, the average number of people living together is 3.4. Slightly fewer than half of the total number of the town's households include at least one person under the age of 18 (43.3%), and 33.4% of Wellesley households include at least one person 65 years old or older.

Of the town's entire population, 58.8% participate in the country's labor force, and do so at a lucrative level. The median annual income of a Wellesley resident 16 years old or older is $99,546, and in a town where 50.3% of married people both work the median annual income for a Wellesley household is $226,250. Within Wellesley, however, there is another end of the wealth spectrum. Nearly 5% of the town's residents live at or below the federal poverty guideline. While 5% is not a small number of people to be living in poverty in a town of 29,550, it's significantly fewer than the national average poverty rate of 10–13% of population.

Of the 58.8% of the town's population who do participate in the labor force, the greatest preponderance of them do so in the realms of Management, Business, Science, and the Arts. Significant numbers of the population work in education, healthcare, social assistance, finance and insurance, and real estate. Nearly all Wellesley residents who work do so in the Commonwealth of Massachusetts, but 45.5% of Wellesley residents work outside of Norfolk County. That means that a lot of Wellesley's population commutes or works virtually. Mean travel time between home and work for Wellesley residents 16+ years old is 29.6 minutes.

Public transportation within Wellesley is limited. The Wellesley Council on Aging offers rides for seniors for medical appointments, weekly grocery shopping and more, Monday through Friday on a 12

passenger/2 wheelchair lift equipped bus. The Catch Connect bus is an MWRTA ride service offered within Wellesley that can be accessed for in-town transportation, similar to a LYFT or Uber service.

Supporting Organizations

In terms of support, the Wellesley Free Library receives most of its funding through the Town's tax-impact budget. An additional 15–20% of its operating expenses come from private donations from the **Wellesley Free Library Foundation** and the **Friends of the Wellesley Free Libraries.** Both entities are private 501(c)(3) corporations that support the mission of the WFL. Their goal is to enrich Library programs and enhancements, not to replace traditional tax-based support.

The Wellesley Free Library Foundation
The Foundation, working in partnership with the Library's administration and Trustees, encourages private philanthropy on behalf of the WFL. This strong public/private partnership builds support for the many enrichment opportunities and special endeavors that make the WFL such an outstanding community resource. Current funding initiatives include support of programs and equipment in the Jackie's Room Technology Education Lab, School Outreach, Wellesley ESOL (English Speakers of Other Languages), and a portion of the Fells Branch Library operating budget.

The Friends of the Wellesley Free Libraries
The Friends strive to maintain the WFL's outstanding reputation and serve the community at the highest level. The Friends sponsor hundreds of programs each year including lectures, concerts, and special events that touch the lives of all Library users. The Friends Bookshop offers great books at bargain prices and is always open during Library hours. Other initiatives include funding for discount museum passes, professional staff development, and maintenance of the Library's beloved aquarium, which delights patrons and visitors of all ages.

Library Trends and Challenges

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 spaces that welcome community members and draw on patrons' desires for gathering, lending, and learning. Services that continue to trend strongly include e-books, small group study spaces, large group meeting spaces, children's interactive learning spaces, smaller service desks, and the desire for gathering spaces in which to eat and access Wi-Fi.

> *"Giving access to information and materials is done particularly well! Librarians are always happy to help and I'm always amazed at the depth and breadth of what WFL has to offer. Ability to find books I'm looking to borrow in a timely manner is important to me, and the process to do so (if not available at my branch) is seamless. Thank you!"*
>
> – SOAR assessment group participant

More recently, the following services are trending in public libraries across the country:

- **COVID Changes** – The desire for informality, hybrid programs, and drop-in programs has become increasingly popular. During the height of the pandemic, people adjusted to the Zoom way of life. While many appreciate meeting in-person once again, a majority of patrons surveyed in the WFL Community Survey prefer the option of attending programs remotely. To accommodate both in-person and remote program attendance, a hybrid approach to programs is a trend that remains popular. For those wanting an in-person connection, there is a desire to connect with neighbors in a less formal way. Patrons have requested drop-in, hands-on activities, informal meet-ups, and expanded Town opportunities such as volunteering with civic organizations or learning about how town government works. COVID precipitated dramatic changes. Libraries responded to the needs of patrons during the pandemic and continue to demonstrate flexibility and ingenuity to continually improve on this "new normal" way of life.

- **Fine-Free Libraries** – Breaking down barriers to access has been a long-standing goal of public libraries. Libraries across the country have revisited the purpose and need for punitive overdue fines. In the Commonwealth of Massachusetts, there are over 350 public libraries but only 68, including Wellesley, continue to charge overdue fines. Eliminating overdue fines was a recurring request of respondents to the WFL Community Survey.

- **Library of Things** – The Library of Things is a collection of non-traditional items such as telescopes, digital converters, and Cricut machines. Puzzles and board games are the highest circulating items, with arts and craft items following close behind. With the exception of Wi-Fi hotspots, patrons are less interested in "things" which involve technology. The Library of Things is a collection that allows patrons to avoid wasting money on something they may only need to use once or want to "try before they buy." The collection is a natural tie-in to the commitment Wellesley has made to sustainability and conservation of natural resources. The collection has seen a steady climb in popularity and continues to evolve and grow to meet the needs of patrons.

- **Virtual and Remote Library Use** – The pandemic created a need for virtual and remote services at a level not previously seen. The number of people borrowing e-books increased and libraries pivoted quickly to offer programs virtually so that patrons could attend from the comfort and safety of their homes. Wellesley's survey showed that 45% of patrons continue to enjoy e-books. However, the majority of patrons prefer that the Library continue to offer hybrid programs so that opportunities to attend in-person or remotely leave the choice up to the patron. Patrons also requested the ability to stream lectures or performances at a later date if they were unable to attend at the time the program was offered.

- **Diversity, Equity, and Inclusion** – More of a sea change than a trend, The American Library Association affirms that "equity, diversity, and inclusion are central to the promotion and practice of intellectual freedom. Libraries are essential to democracy and self-government, to personal development and social progress, and to every individual's inalienable right to life, liberty, and the pursuit of happiness. To that end, libraries and library workers should embrace equity, diversity, and inclusion in everything that they do." The WFL through its administration, staff, Trustees, and supporting organizations is wholly committed to the idea of supporting and welcoming all patrons. The mission of the WFL "to connect our community to each other and to the world" speaks to the work of bringing people together to forge human relationships. There are no requirements for these connections other than efforts to ensure equality and justice for

all—including but not limited to racial, gender, ethnic, sexual orientation, gender identity, economic, climate—all of which are of paramount importance to our institution. "Ensuring a culture of belonging and building equity within the community" is one of our core values as is "collaborating with other Town organizations and institutions," both of which include efforts in the area of equity and justice. The WFL provides information, materials, programs, services, and spaces through the lenses of equity and inclusion. Our leadership models these values in all ways including through personal example, professional development opportunities, and through a supportive culture of respect for all.

- **Book Bans** – An unfortunate trend across the country and a key challenge for libraries is an increase in book banning. Books written by and about people of color and the LGBTQ+ community have been challenged and removed from shelves of schools and public libraries. ALA's Office of Intellectual Freedom Director, Deborah Caldwell-Stone, writes "Their aim is to suppress the voices of those traditionally excluded from our nation's conversations, such as the LGBTIA+ community or people of color." From the PEN America website, a site that tracks book banning: "Since PEN America published our initial *Banned in the USA: Rising School Book Bans Threaten Free Expression and Students' First Amendment Rights* (April 2022) report, tracking 1,586 book bans during the nine-month period from July 2021 to March 2022, details about 671 additional banned books during that period have come to light. A further 275 more banned books followed from April through June, bringing the total for the 2021-22 school year to 2,532 bans. This book-banning effort is continuing as the 2022–23 school year begins too, with at least 139 additional bans taking effect since July 2022." To date, the Wellesley Free Library has received no formal Request for Reconsideration forms from patrons. Staff members have reported having multiple conversations with patrons regarding book selection, and WFL's Collection Guidelines have helped to inform staff and patron discussions.

> *As a parent, my children and I were ALWAYS at the library. Now that I take care of grandchildren five days a week I love it even more! Home away from home!*
>
> – SOAR assessment group participant

STRATEGY GOALS AND INITIATIVES

Strategic Goals

In order to address the feedback collected from the community and to carry out the mission of the WFL, the Trustees have created the following strategic goals (in no specific order of priority):

    I.   **Improve space within the library's buildings to support the WFL as a community gathering place and cultural destination and maintain facilities' excellence**

    II.   **Enhance access and outreach to promote free and convenient use of resources, reduce barriers to service, and communicate offerings to the community**

    III.   **Foster a fearless, flexible and fun workforce, supported by strong operational processes and systems, in order to provide exceptional Library services**

    IV.   **Design programs and educational opportunities which reflect the evolving needs of the community**

Strategic Initiatives

The following Strategic Initiatives support the Strategic Goals outlined above, which have been approved by the Library Trustees. Within each goal, the WFL has identified initiatives by priority level with Level 3 being the most challenging to achieve. Goals are listed within each level in no particular order of preference. It is the responsibility of the Library Director to determine the most effective timing for the development and implementation of each goal, taking into account expenses and potential funding sources. The Library Director's annual Action Plan will be approved annually by the Trustees and subsequently submitted to the Massachusetts Board of Library Commissioners.

GOAL I: Improve space within the library's buildings to support the WFL as a community gathering place and cultural destination and maintain facilities' excellence

    A. Revitalize space at the Hills Branch Library

        <u>Level 1</u>

- Rearrange furnishings within Hills to maximize reading and cozy spaces

        <u>Level 2</u>

- Update interior to maximize space with respect to furnishings and fixtures

        <u>Level 3</u>

- Update interior to maximize and improve patron experience with respect to furnishings, fixtures, flooring, bookshelves, and hearth while maintain a historic character and charm in a cozy lounge-like space

B. Refine space at Main Library

   Level 1

   - Refine usage and rules of Commons room and help the patrons clearly understand its role as a gathering space in the Library
   - Explore programs to maximize usage of the Commons room during less busy hours (e.g., evenings and weekends)

GOAL II: Enhance access and outreach to promote free and convenient use of resources, reduce barriers to service, and communicate offerings to the community

   Level 1

   - Deepen collaboration with municipal departments
   - Explore technologies to maximize hybrid programs and remote access
   - Determine best practices for hybrid programs
   - Increase outreach to new residents

   Level 2

   - Explore ways to continue welcome/greeter service
   - Explore ways to expand hours in Open Lab
   - Provide additional opportunities for volunteers
     - Docents, ESOL, and additional opportunities outside traditional scope
   - Review World Language collection to reflect community needs
     - Simplified Chinese, French, Spanish
   - Increase number of card holders and review policies to facilitate getting a library card

   Level 3

   - Eliminate Library overdue fines
   - Review and improve marketing practices and strategies including social media
   - Explore opportunities for connecting patrons with mobility issues to the Library

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

   Level 1

   - Enhance technical capabilities of all staff to utilize Library software
   - Foster a relationship with those exploring public service careers in order to build and strengthen the Library's future workforce
   - Provide additional DEI, anti-bias and customer service training for all staff
   - Encourage staff to take advantage of professional development opportunities

<u>Level 2</u>

- Review hiring practices and postings to promote diversity and encourage all populations to apply to work at the WFL
- Review current job descriptions and roles of professionals and paraprofessionals
- Explore ways to retain, attract and engage staff and provide job growth within the Library

<u>Level 3</u>

- Create a workplace culture where people from all backgrounds will want to work
- Assure that WFL creates a workforce reflective of our broader community

GOAL IV: Design programs and educational opportunities which reflect the evolving needs of the community

<u>Level 1</u>

- Meet patron desire for more informality – explore drop-in, meet-up and informal programs
- Plan and present more programs suitable for all ages (e.g., live animals, music performances)
- Plan more programs focused on sustainability (e.g., energy transmission, climate action, climate coaching, etc.)
- Plan programs that help residents understand their town government
- Offer more local programs that connect neighbors

<u>Level 2</u>

- Design programs to promote media literacy and identify disinformation
- Improve remote, streamed, and hybrid programs
- Enhance programs and connections for marginalized, vulnerable, and senior populations

<u>Level 3</u>

- Create artist-in-residence program (poet, author, artist, musician, etc.)
- Encourage the Freedom to Read and educate the community on the Library's collection and program guidelines
- Examine new technology and its impact on the Library's future, including AI and the way people use and create information

CONCLUSION

The Wellesley Free Library has long been a success story; a well-run and efficient institution providing exceptional library service to a community with high standards and higher expectations. WFL's story continues through a dedicated commitment to maintaining outstanding buildings, collections, and programs. Community engagement is our key to remaining relevant and essential to all residents. The purpose of planning is to prepare for new efforts that continue building on existing strengths while exploring new areas for development and improvement. The ideal plan provides flexible direction and strategies that can broaden as needed to take advantage of unanticipated opportunities as they arise. Success equals seeking out and implementing marvelous initiatives that support our mission, vision, and values.

> *"It's the public building in town I visit the most, to work, to learn, to ideate and borrow books and games. It's really the heart of the town."*
>
> – SOAR assessment group participant

Wellesley Free Library 2024–2028 Strategic Planning Committee

APPENDIX A: Patron Survey

The SPC designed and distributed a community survey to learn how patrons engage with the library, how familiar they are with the WFL's offerings, and what collections and programs are of greatest interest to them. In addition, the SPC sought to learn:

- How welcome patrons feel in the Library;
- How interested patrons are in borrowing digital materials (e-books, downloadable audio, streaming video);
- How the Library should use the new Commons space;
- What type of refurbishing of the Hills Branch would be most desirable;
- What new Library of Things items might be of interest; and
- What languages other than English the collection might focus on.

The survey was conducted from early January through mid-February, was available online and in paper format, and was translated into Chinese. The library reached out to key constituency groups through its newsletters (both general and children's), Town Meeting members, Wellesley News and Announcements, PTOs, COA, NRC, neighborhood email lists, WhatsApp groups etc.

A total of 610 residents of all ages participated in the survey, though it skewed older: 70% of the respondents were over 50. The ethnic breakdown was 88% white, 8% Asian with the remaining 4% including all other races and 3.1% of the respondents identified as Hispanic. The younger age groups were more diverse: 80% were white, 13% Asian and over 5% were two or more races with 8% identifying as Hispanic for those respondents under 50.

Members of the survey population were significant library users, with 38% visiting weekly and an additional 30% visiting a few times per month. A rough breakdown suggests that respondents spent about 60% of their time at the Main Library, 10% at the Hills and 8% at the Fells, with the balance of time (23%) using the e-library. This was a fairly consistent finding across all ages and demographic groups with the 60+ group spending slightly more time using the e-library and the 20-40 age group spending slightly more time at the branches. For all users, the number one reason to visit the library was to access physical materials (83%). The second-most cited reason was to attend a program (31% of those over 50) or to relax, study, and meet friends (27% of those under 60).

Survey respondents were generally at least somewhat familiar with offerings at the library, with more than 90% familiar with reserving materials and using the Minuteman catalog, finding out about adult and children's programs, and accessing museum passes. Survey respondents were less informed about volunteer opportunities and how to access research databases (though the 20−30 age group was significantly more informed about the latter).

Unsurprisingly, given that the survey was prominently featured in the Library's newsletters and website, these two communications channels were considered the most effective way for residents to learn about Library offerings, at 59% and 44% respectively. The ESOL program, PTO newsletters and *The Swellesley Report* were other ways respondents learned about the Library's offerings. Social media was a less effective tool for respondents, many of whom bemoaned the loss of *The Wellesley Townsman* as a way to keep them informed.

Survey respondents viewed the library staff with enthusiasm, with 96% of the survey respondents indicating they feel welcome at the Library. The staff was particularly praised for being helpful and responsive to questions. Many staff members were singled out by name, particularly those in the Children's Department. Several respondents mentioned that while they liked the efficiency of the self-check machines, they missed the personal interactions with the staff when taking out materials. Others mentioned that someone in the role of "greeter" would be a welcome addition to the Main Library.

The most requested collection enhancements were current popular books for adults (47%) and e-books and audio books (44%), followed by current popular books for children (28%) and the Library of Things (20%). Respondents suggested more magazines, "coffee table" books, audio foreign language teaching materials, graphic novels, travel books, hardcopy versions of *The New York Times* and *The Boston Globe* crossword puzzles for patrons to take away, streaming materials from premium channels like HBO and Hulu, and more interactives in the Children's Room. Several people noted that the physical collection seemed smaller and/or less visible after the renovation and others requested the ability to place a greater number of digital holds. About 18% of the survey respondents (31% of those under 50) read, view, or listen to materials in languages other than English. The most requested non-English materials were Simplified Chinese (32), French (19), Spanish (18) and traditional Chinese (10). A plurality of respondents appreciated the range of programs offered by the library (77%), that Library displays reflect the diversity of our community (62%), and the broad range of ideas represented in the Library's collection (62%).

Board games and puzzles were the most requested additions to the Library of Things (LOT) across every age group (38%). Arts and crafts, also of interest to all age groups, was the second overall preference (38%), followed by tools (28%). In general, younger respondents (< 50) were more enthusiastic about the LOT than older ones (> 50) and were particularly interest in photography and/or video equipment (37%) and outdoor games (32%). Comments about the LOT were generally favorable and included requests for a sewing machine, a traveling LOT collection for the branches, and a better organized LOT catalog.

Digital borrowing is important to less than half of respondents. Over 55% reported that they do not borrow any digital content, or it is a very small amount of their borrowing, rising to 66% for Asian respondents. The least interest in digital borrowing came from those under 20 (71%) and over 80 (84%).

Most respondents were primarily interested in programs for their own age group and parents were also interested in children's programs. A significant majority (78%) were interested in programs that are suitable for all ages, and the Live Animal programs were particularly beloved. The most popular programs were lectures, author talks and performances, with younger respondents also choosing story-times and arts and crafts programs. Computer classes and technology training appealed primarily to older adults. Less than a third of respondents were interested in book clubs or job and career advancement courses. Those who commented about programs typically wanted more children's events and sensory story-times, more "drop-in" classes, more e-books, large print books, more DVDs, more magazines, more graphic novels, more kids programs on weekends, and more computer lab time (perhaps staffed by volunteers). Respondents also suggested specific programs they would like to attend, including groups for people who want to become children's authors; informal drop-in foreign language chat groups (not ESOL); lecture series on town government; sign language classes; and informal music/jam sessions.

There was a strong preference for in-person programs (35%) when compared with remote-only (3%) but hybrid was the clear winner for most people (50%); 6% didn't have a preference. Many respondents requested the ability to stream programs either simultaneously or after they were concluded, and others requested more drop-in programs without required advance registration.

The survey asked what activities would be preferred in the new Commons room. Younger respondents were generally more enthusiastic than older ones about activities in the Commons area. In general, music concerts (40%) and cooking classes (39%) were the top two choices, though storytelling (like NPR's MOTH radio hour), cultural exchange events and maker programs all received support from over 30% of respondents. No one liked the idea of using the Commons to take a quick phone call. The most requested enhancements to the Commons room were a coffee machine and/or vending machine.

The most important technology services that the library provides are charging devices and charging stations (56%). Open lab times for general tech help were primarily of interest to seniors while interest in Wi-Fi hotspot lending and premium video and audio editing software skewed younger. No age group was particularly interested in laptop/iPad lending stations, presumably because most survey respondents bring their own technology to the library.

The survey also asked how the Hills branch should be utilized, and 76% of respondents preferred the Hills to maintain comfortable lounge-like spaces and quiet zones. Only 46% of respondents wanted the Hills to be used primarily for socializing (of most interest to < 20 and 70+ residents) but 59% would like to be able to use personal electronic devices. Respondents who added comments to this question supported keeping the historic nature of the Hills building (9), keeping a children's area (9), having quiet areas (5) and allowing socializing (5). Several wanted better use of the outdoor space surrounding the building and one suggested an electric fireplace to add to the cozy vibe.

The final two survey questions were open-ended. The first asked, "Tell us why the Wellesley Free Library is important to you and what you think we do well?" and was answered by 382 respondents. The comments were broken down into areas (general, facility, staff, collection, displays, programing) with some comments applying to more than one area. Of the 659 comments, 95.4% were positive, 0.2% were negative, and 4.4% described opportunities that would help the library improve. Respondents were extremely appreciative of the collection in general and the expanded access provided by the Minuteman Library Network. Children's (staff, programs, collection, and newly renovated space), ESOL classes, the Friend's book shop, technology classes for seniors and the art exhibits/displays in the Main Library were all singled out multiple times for special praise.

The second open-ended question asked, "Is there anything we haven't asked that you would like to add?" and there were 170 comments with suggestions for improving the WFL (many of which have been added to the relevant sections of this appendix). The most requested action by far was to add more hours: on weekends, in the summer, and in the evenings. Expansion of the museum pass program was also high on respondents' lists. Opportunities to socialize were mentioned regularly, particularly by parents of young children wanting to socialize with other parents outside of story-times, and by adults requesting adult-only events. Facilities requests ranged from adding maker spaces to more outlets in the carrels to expanded space for teens and tweens to moving the iPads out of the Children's Room. Requested policy changes included improved scheduling of conference and study rooms, waiving conference room fees for board meetings of community groups, eliminating fines, and clarifying the food/drink policies in the WFL.

APPENDIX B: Interviews

As part of our effort to engage the public in our strategic plan, the SPC conducted 24 interviews over several weeks. The subjects of those interviews consisted of a diverse sample of responders, including among others, representatives of various town departments and town services, underserved populations, religious-affiliated organizations, those for whom English is not their primary language, and those for whom access to the Library may present a challenge.

Utilizing our "SOAR" (Strengths, Opportunities, Aspirations and Strengths) method, the following salient themes emerged from those interviews:

STRENGTHS

- The Library offers wide range of resources/programs.
- The Library is highly regarded for its Innovation.
- The Library is recognized as community gathering place that is neutral and safe.
- The Library is the only resource in Town that serves everybody.
- The Library staff was consistently praised as knowledgeable and helpful.

OPPORTUNITIES (what we could do now)

- The Library should continue to look at ways to break language barriers.
- The Library should examine better/wider use of the Commons room.
- The Library should explore more social opportunities such as coffee and conversation and/or "meet your neighbors" programs.
- The Library should explore creating dedicated adult spaces for conversation.
- The Library should investigate a more effective way to market its many services.
- The Library should explore developing programs to assist new families/residents.
- The Library should explore ways to offer better access for patrons who do not drive.

ASPIRATIONS (what we could do with unlimited resources)

- The Library could be open more hours on weekends.
- The Library could assist residents in learning about our Town (including its government, voting, volunteer opportunities).
- The Library could offer multilingual classes.

RESULTS (how we know if we are successful)

- The Library would serve and represent an even more diverse population.
- The Library would be more accessible to seniors and/or those with mobility/transportation issues.
- The Library would optimize uses for the Commons room.
- The Library would have dedicated adult spaces for conversation resulting in more socialization opportunities.

APPENDIX C: Focus Group SOAR Assessments

The SPC ran six virtual SOAR sessions to assess the WFL's Strengths, Opportunities, Aspirations and Results: two meetings which were open to the public, and one each for the Trustees, Friends, Foundation, and SPC. The focus groups were also asked to reflect on the Library's mission. Comments made by the participants were recorded on a Google Jamboard (virtual place to place text "sticky notes") and these Jamboards were analyzed by the SPC.

All participants were enthusiastic about the Library's role in the community. Comments included:
- "One place that serves people from birth through old age"
- "Forward thinking"
- "I go to learn about technology, things I do not know anything about"
- "A place of discovery"
- "It's free!"
- "Enduring value"
- "Open mindedness and inclusivity - a safe space for marginalized folks"
- "Innovative library spaces and patron-oriented service"
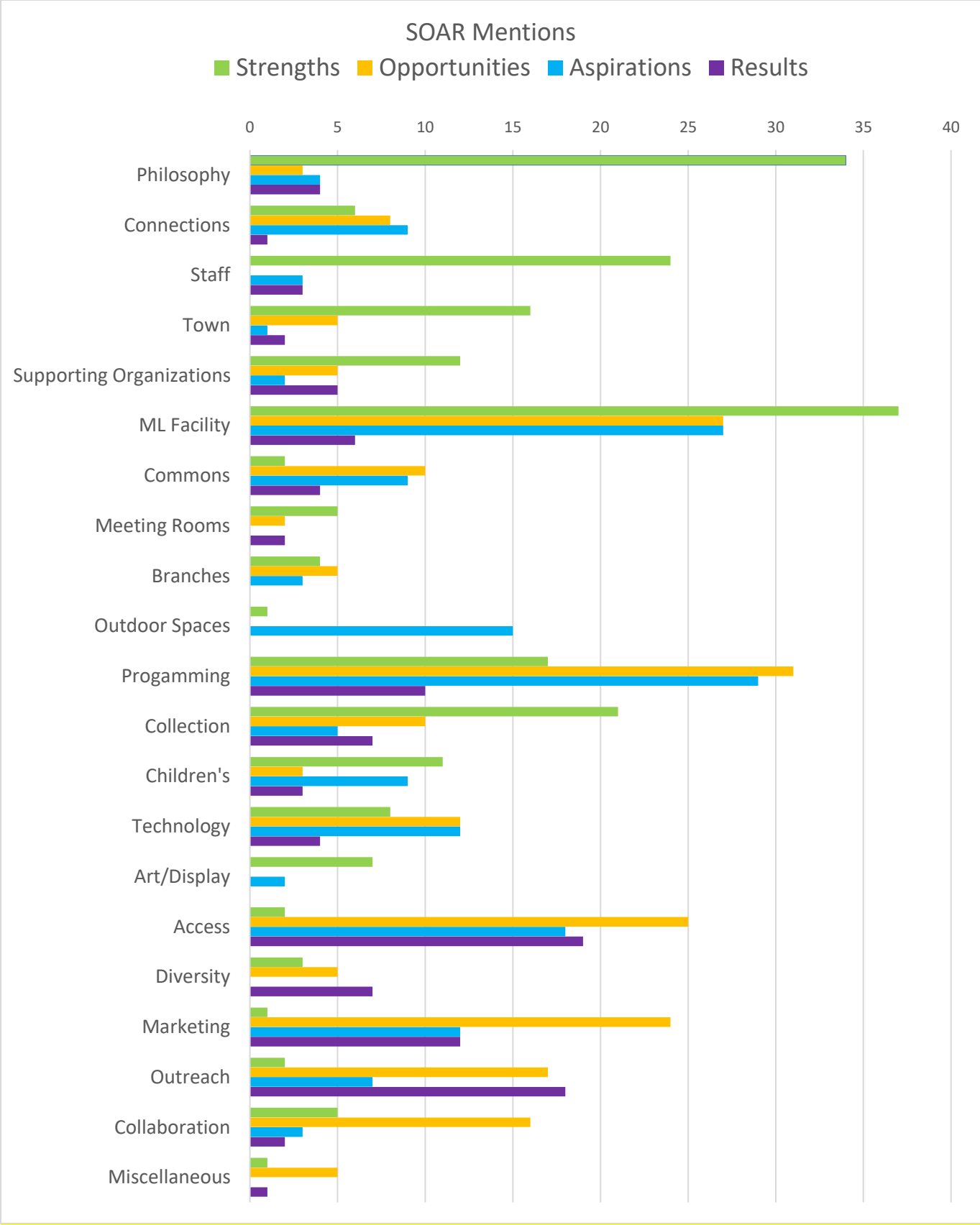- "Library has always dared to try something new"

The chart that follows shows a breakdown of the comments made by the focus group participants in each of the four SOAR categories by area (Access, Staff, Collection, Program, Facilities etc.).

Strengths

The most highly praised areas were the Main Library facilities, Library philosophy, staff, collection and programs, and how supported the Library was by the town, Friends, and Foundation. Words like "inviting," "comfortable," "great scale," "variety of spaces," "safe," "beautiful," "modern," "clean," and "human centered" were used to describe the building. The Library's role in the community was described as "out in front," "fresh," "something for everyone," "trusted," and "embedded." The staff was very much appreciated and described as "friendly," "wonderful," "informative," "curating,", "conscientious," "welcoming," and "helpful." Director Jamie Jurgensen and custodians Mike Groh and Jose Perez Ventura were singled out with special praise.

Other strengths mentioned were:
- Wonderful community gathering place and "third space" (away from home and office)
- Successful renovation with many improvements, including the Commons room, patron browsing area, a creative and beautiful Children's Room, and additional meeting spaces
- Beautiful new garden and children's space at the Fells Branch
- Excellent customer service
- Book recommendations from librarians
- Support organizations like the Friends and the Foundation, and a town willing to support enhancements
- Variety of collections, including up-to-date physical books, strong digital materials, and Library of Things
- Story-times and children's programs, Jackie's Room, and ESOL programs
- Art gallery and displays tied to current events
- A willingness to take risks

SOAR Mentions

Legend: Strengths (green), Opportunities (yellow/orange), Aspirations (blue), Results (purple)

Category	Strengths	Opportunities	Aspirations	Results
Philosophy	34	3		4
Connections	6	8	9	1
Staff	24		3	3
Town	16	5	1	2
Supporting Organizations	12	5	2	5
ML Facility	37	27	27	6
Commons	2	10	9	4
Meeting Rooms	5	2		2
Branches	4	5	3	
Outdoor Spaces	1		15	
Progamming	17	31	29	10
Collection	21	10	5	7
Children's	11	3	9	3
Technology	8	12	12	4
Art/Display	7		2	
Access	2	25	18	19
Diversity	3	5		7
Marketing	1	24	12	12
Outreach	2	17	7	18
Collaboration	5	16	3	2
Miscellaneous	1	5		1

Opportunities

The areas in which the library has the most opportunity to improve includes access, marketing and outreach, and collaboration. Focus group participants also had ideas on how to improve the collection and the library's physical facilities. Some of the opportunities mentioned were:

- Access and Outreach
  - Eliminate fines, which are a barrier to access
  - Add more programs and community outreach for underserved groups in town (seniors, Barton Road)
  - Expand the Museum Passes program

- Marketing and Communications
  - Improve communication about all the library offers
  - Act as a central communications hub for the town and disseminate information (as the *Townsman* used to) via a community bulletin board and/or community calendar

- Collaboration
  - Collaborate with realtors to welcome new residents to town and put a "Welcome Wagon"-style packet together with information about the library (collection, programs etc.)
  - Community bulletin boards and collection of local newsletters (e.g., COA, Wellesley Neighbors)
  - Enhance collaboration with WPS and college libraries
  - Connect more people to volunteer opportunities

- Facilities
  - Figure out how to market the Commons room better and optimize its use
  - Dedicated library space for adults
  - Update the Hills interior and enhance its historic nature
  - Consider maker spaces and other technology innovations

- Programs
  - Add media literacy classes to help people see through disinformation
  - Expand hybrid programs and make daytime programs available to view later for people who work during the day
  - More programs, especially at branch libraries
  - Add drop-in programs to help people re-socialize after the pandemic and strengthen interpersonal interactions

Aspirations

The "Aspirations" portion of the SOAR exercise focused on how the library could extend its mission with greater resources (e.g., staff time and funding). Suggestions included:
- Access and Outreach
  - Bookmobile
  - Give each librarian a special age group focus
  - Hire dedicated assistant for emerging technologies and training

- Marketing and Communications
  - Hire a professional marketer (with a significant marketing budget)

- Facilities
  - Add vending machines and/or a cappuccino or Keurig coffee maker to the Commons room
  - Add gardens or "outdoor rooms" to enhance the rear entrance to the building and draw people into the library and enhance outdoor programs
  - Space improvements like new recording booth/studio, small movie theater, "drive thru" book pick up, digital studio, makerspace for teens and tweens
  - Transform outside space with sculpture garden, children's garden, areas for outdoor events like outdoor art festival or concert series
  - Add underground parking or deck to the Cameron Street lot and add community space above it with connection to the Main Library
  - Buy housing near Fells to increase parking

- Programs
  - Create more social events to connect community members, like Wellesley College Club's "Canines & Cocktails"
  - Mini Boston Speakers series
  - Provide library trips to Boston theaters and concerts which are difficult for many to access
  - Artist in residence with associate programs/events

Results

The focus groups were asked to suggest metrics for the Library to determine how we would know whether the strategic goals we might implement had been effective. Because the Library is a data-driven organization, we already track many metrics like circulation, visits, interactions with the librarians (how many questions are asked and on what topics), programs (numbers and attendance data), numbers of library cards, website visits, newsletter signups, and volunteer hours.

Other suggestions were:
- More "buzz," like positive non-library generated mentions in social media or more positive talk about the library in town (hard to measure)
- More book clubs covering increasingly diverse ranges of interest
- More people using the Commons area of the library
- Increased attendance at fundraising events and more successful fundraising
- More college students using the Library
- Increased partnerships with town organizations
- Increased Young Adult circulation (track tweens in particular)
- Increased book delivery for seniors
- Positive feedback received from newly instituted post-program surveys of participants
- More small groups using the library (playing games, meeting friends)

APPENDIX D: Observation Study[1]

As part of the information gathering process for Wellesley Free Library's (WFL) five year Strategic Plan, a User Observation Study ("Study") was completed for a selected period of four months in 2023. The Study was designed to gather information about the most common activities in which library users engaged while in the Main Library. Traditionally, libraries rely on circulation statistics to measure usage; however, circulation alone does not tell the full story. In fact, as the nature of library use evolves, circulation statistics by themselves are becoming less informative. A study reported in Public Library Quarterly found that circulation constituted only nineteen percent[2] of all customer behaviors.

The Studies in 2023 and 2017 were conducted during the same days in a two-week period in the same four months: February, March, April and May. During each month, observations were recorded over the same seven-day sample, including weekdays and weekends. Observations were recorded at three consecutive hours and times between mornings, afternoons and evenings. In 2017, the study was completed using paper and pencil, then entered into an Access database. In 2023, Axel Thompson, Technology & Innovation Assistant, created an electronic method that automatically downloaded information, using an iPad that observers used to collect data. In 2023, the Study was conducted only at the Main Library.

Observers used their own judgment to characterize demographics including age (child, teen, adult, senior) and gender (female, male, unsure). Each person was characterized as performing one of the following activities: Attending Program, Browsing, Eating (added in 2023), Interacting with Others, Reading, Researching/Studying/Writing, Self-Service Circulation, Sitting/Standing Alone, Using Laptop/Mobile Device, Using Library Computer, Using Photocopier/Printer, With or Waiting for Staff. Only a single activity was allowed per patron and the category that best fit the patron's primary activity was selected.

Results from 2017 and 2023 were compared and provided some surprising observations, as longitudinal data provides the opportunity to analyze shifts in trends over time.

The Main Library completed an interior renovation in 2021 which affected the Study. More conference rooms as well as increased space to study and interact appeared to make a difference in the activities observed in the 2023 Study. While fewer seniors were observed, numbers of teens and children increased. Laptop/mobile device usage also saw a sizeable increase from 2017 while Library computer usage decreased. Interacting with others increased as a popular activity which could be attributed to the renovation.

In 2023, 5723 observations were collected compared with 7325 observations in 2017. The lower number in 2023 tracks the lower attendance trends observed since the Library reopened after Covid. A sizeable decrease in seniors utilizing the Library in person, lower circulation, decreased program attendance and

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[1] The format of this report originated at Dakota County Library and has been edited to insert WFL Observation Study information numbers, graphs, assumptions, interpretations and relevant content. Many thanks to Murray Wilson at DCL for sharing the report, as well as observation templates and instructions so that Wellesley Free Library could readily conduct its own observation study. Observation Study Committee; Axel Thompson, Rachael Hobson, Annette Diola, Arne Christiansen, Lisa Arm, Emma Weiler, Tyson Bolles, Carol Richards, Jamie Jurgensen

[2] Janet M. Lange, "Public library users, nonusers and type of library use," Public Library Quarterly 8 (1987/88).

decreased use of Library computers are all likely attributable to the ongoing recovery seen nationwide following Covid. Innovations instituted by the WFL in response to the pandemic (remote access) may also be responsible for fewer in-person visits to the Library.

The gender breakdown in 2023 was 55.5% female, 38.9% male and 5.6% unsure which compared with 50.5% female, 49.5% male in 2017. The age group distribution was also different in the 2023 Study, with about twice as many children and teens (22% in 2017, 44% in 2023) and one third as many seniors (22% in 2017, 7% in 2023). Adults made up 49% of the observations in 2023 compared to 57% in 2017.

In 2023, "Tables/Workrooms," which includes the new conference and meeting rooms, remain the most utilized areas (40%). After the renovation, the Children's Room nearly doubled in utilization (15% in 2017, 31% in 2023). The Commons Room (formerly the Media Room) more than doubled in usage (3% in 2017, 7% in 2023). The High School Room saw a small decrease in utilization which might be attributed to more teens using the new conference rooms.

In 2023, "Using Laptop/Mobile Device" remains the top activity across all age groups, almost doubling since 2017 (21% in 2017, 35% in 2023). "Using Library Computer" (16% in 2017, 7% in 2023) was replaced as the second-most observed activity by "Interacting with Others" (16% in 2017, 26% in 2023). The increase in interaction among patrons is a continuing shift from traditional library spaces to spaces that used to be quiet but now promote community gathering. The number of publicly available computers has been reduced since 2017 because of lower demand. The increased in "Interacting with Others" was particularly notable in children (31% in 2017, 42% in 2023). "Using Library Computer" is dominated by adults, particularly seniors and adult males. With the exception of "Using Laptop/Mobile Device" and "Interacting with Others", all other activities have a lower rate of observation in 2023 compared to 2017, probably because the first two categories have increased so dramatically.

"Attending Program" decreased dramatically from 15% in 2017 to 5% in 2023, probably because hybrid and Zoom programs were not available in 2017. Only seniors showed a slight increase in "Attending Program" (18% in 2017, 20% in 2023).

Within the new Commons area, the two most observed activities were "Interacting with Others" (does not include cell phone use) and "Using a Laptop/Mobile Device." "Eating," which was not allowed in the Library in 2017, was 10.6% of observed Commons activities, ranking third. When looking at activity by age group and time of day, there is a high level of usage by adults and children between the hours of 11 A.M. to 1 P.M. Child usage drops off at 1 P.M., presumably the time when young children return home for lunch. This coincides with general staff observations of young children and caregivers using the space. Some Wednesday afternoons indicated a higher number of teens due to early release from school. Teens seen during the day could also be attributed to college-aged students using the space. There is a large decrease in child use of the room after 7 P.M. when adults are observed at a much higher percentage (82%).

Staff noticed an increase in the usage of the Commons Room since the Library reopened after renovation. Observed activity spiked in April possibly due to April vacation for area public schools. Observations by day of the week show Sundays and Mondays to be the highest utilized days. The high utility of Sundays could be attributed to a Girl Scout Troop regularly meeting there.