

MAXWELL MEMORIAL LIBRARY
STRATEGIC PLAN
2018-2020

Approved October 16, 2017
Suggested calendar added November 27, 2017

Maxwell Memorial Library Mission Statement

Maxwell Memorial Library is a primary resource for a diverse community seeking good books, accurate information, lifelong learning, access to technology, and programs for all.

Planning Summary

To create this strategic plan, the 2017 library Board of Trustees and Director followed a general outline provided by Ron Kirsop, Assistant Director, Pioneer Library System, in a training workshop held October 2, 2016. Director Katy Benson agreed to be the project manager, with the planning committee composed of all trustees who were available for two working meetings.

Community input came from several sources:

1. An online survey that ran from April 24 to June 15, 2017.
2. Two focus groups: One of 10 people invited from the community, primarily library users; and a second group of 8 staff members. OCPL Member Services Coordinator Amanda Travis moderated both and wrote a report to the board summarizing both.
3. Individual interviews with nine community members, each a leader in a local organization.
4. Trustees' input gained through the process of analyzing data, identifying priorities, and creating goals with action steps from the priorities at working meetings.

For additional information about this summary or to offer feedback, contact the Maxwell Memorial Library director or Board president.

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Goals-

Goal One: Attain sustainable funding

Purpose: Establish a funding stream to increase money received from various venues and create fundraising activities that can be grown from year to year and carried out by a volunteer board and staff of a small- to medium-sized library. Ensure the community understands library funding. Rebuild a fund balance of at least \$100,000.

Measurement: Track the start, progress and financial results of each step. Track the number of business and individual contacts made, the number of donors, and the total amount of donations.

Tasks:

- 1) Increase the donor base. **Q1-17 – Q1-18**
 - a) Investigate additional means of growing a reliable donor base. **Q3-18**
 - b) Target businesses with letters and in-person meetings for donations, grants, and in-kind giving. **Q2-18 – Q4-18**
 - c) Create and maintain a detailed database of mailing lists and donors over years. **Q1-17 – Q4-18**
- 2) Increase the dollar amount of funds raised annually. **Q1-17 – Q4-18 and ongoing**
 - a) Investigate additional grant sources for libraries. **Q2-18 – Q4-18**
 - b) Investigate the use of a professional fundraiser. **Q4-18 – if wanted, budget for in Q1-18**
 - c) Research and identify fundraiser events that a library and board of our size can do. **Q3-18**
- 3) Coordinate with the Friends of Maxwell Library **Q1-17 – Q2-18**
 - a) Identify fundraising strengths for each, as well as areas in which they can work together for better results.
 - b) Set financial goals for Friends and for Board.
- 4) Continue with annual school district tax levy referendums to receive a major source of the annual operating budget. **Q2-18**
 - a) Propose an increase of at least \$33,000 in 2018 to offset the final loss of Town funding.
 - b) Plan for staff, board and community education on where funding comes from, how it is spent, and why requested increases are needed.
 - c) Achieve a funding level that covers basic operational needs so that subsequent increases stay within New York's 2% tax cap.
- 5) Create an annual fundraising calendar. **Q2-18**
 - a) Research the benefits of having a fundraising calendar and how to make one.

Goal Two: Enhance staff training and professional development

Q1-17: Oct-Dec 2017 **Q2-18:** Jan-Mar 2018 **Q3-18:** Apr-Jun 2018 **Q4-18:** Jul-Sep 2018 **Q1-18:** Oct-Dec 2018

Purpose: Give each employee who works with patrons the training needed to pass the Clerical Competencies Checklist. Help all employees understand the library's customer service expectations and strive for excellent customer service practices.

Measurement: Log staff training sessions and individual training/education hours. Do a patron survey of customer service satisfaction. Use Clerical Competencies Checklist to assess employees' knowledge and skills and to encourage positive effort and ongoing learning.

Tasks:

- 1) Provide relevant training opportunities. **Q1-17 – Q4-18**
 - a) Ask staff what areas and topics they need or want training in, and then find resources for group or individual instruction. **Q1-17**
 - b) Make use of OCPL and CLRC trainings as available. **Ongoing**
 - c) Require staff to continue education in topics of interest and relevant to jobs or assigned work.
 - i) Director provides work time to pursue professional development.
 - ii) Director asks for employees' logs, summaries or other tracking of time, topics and results.
 - d) Cross-train staff to broaden opportunities for professional growth and have more employees able to accomplish tasks. **Ongoing as director sees fit.**
- 2) Set customer service goals. **Q2-18**
 - a) Work with staff to create a list of expectations for clerks, administrators, volunteers, and librarians. For desk clerks, this may be a revision of the Clerical Competencies Checklist. **Q2-18**
 - b) Devise a way to test customer service proficiency that encourages staff, using Clerical Competencies Checklist or other tool. **Q3-18**
 - c) Provide at least two presenters, webinars, or exercises on customer service annually. **Q2-18 – Q4-18**
 - d) Create or revise policies as needed to establish expectations of public and staff behavior, and to offer support and guidance for staff and administrators. **Q2-18 – Q4-18**

Goal Three: Increase community outreach and partnerships

Purpose: To improve the library's ability to reach non-patrons through partnerships with other local organizations; to offer programs and projects we could not do on our own; to establish the library as a willing partner and resource for community development and good; to establish the library as a center for community interests and activities.

Measurement: Increase statistics for programs, attendance, partners, library room use and attendance. Survey patrons as well as community organizations to judge increased public awareness of library presence and activities.

Tasks:

- 1) Use U.S. Census, school district and other data to chart community demographics and identify high-need populations. **Q1-17**
- 2) Based on above information, determine which populations Maxwell can work with and how. Potential civic partners include, but are not limited to, the Erie Canal Museum and Park, the Camillus Historical Society, Greater Camillus Chamber of Commerce, the Town and Village

of Camillus, civic organizations such as Rotary and Elks clubs, Camillus Senior Center, The Town Shop, food pantries, senior and assisted living homes, and more. **Q2-18**

- 3) Use 2018 centennial year activities to form relationships with local organizations and people, and find out if and how relationships can continue for mutual benefit. **Q1-17 – Q1-18**
- 4) Meet with local business people to find out what their business's needs are and how the library might offer solutions or resources. **Q2-18 – Q3-18**
- 5) Explore with other libraries how we might coordinate to provide library programs and services and to share expenses. **Q1-17, Q1-18**
- 6) Work with West Genesee schools to further establish lines of communication and information sharing. **Q2-18 – Q4-18**
 - a. Obtain a calendar of study topics for all grades from Superintendent Brown.
 - b. Meet with teachers and school librarians to find out how the library can coordinate materials and programs with study topic calendars.
 - c. Show teachers library resources and demonstrate how to locate resources in catalog, navigate electronic resources, etc.; find out what resources they need.
 - d. Establish a relationship with each principal in the district.

Goal Four: Evaluate, improve and enhance programming Q1-18, 2019

Purpose: Augment established programs and activities for pre-K and pre-teens by focusing on adults, young adults (18-30) and teens (12-18), find out what our community wants and needs, including high-need populations; find and implement ways to successfully assess programs and programming needs; increase program attendance.

Measurement: See Task 2 below.

Tasks:

- 1) For each age group,
 - a. determine local interests and needs in programming.
 - b. do an environmental scan to determine what other nearby organizations provide similar programs, and whether there is need and desire for additional programs.
 - c. research and create programs that fit interests and needs.
- 2) Measure success of programs
 - a. Determine methods that will give us sufficient information that can be measured.
 - i. Input survey data to a spreadsheet, or use software that tabulates and reports.
 - ii. Evaluate Public Library Association's Project Outcome for program assessment (www.projectoutcome.org).
 - b. Implement measuring tools and use results to keep, drop or revise programs

Goal Five: Assess library building, grounds and spaces for needed improvements.

Purpose: To evaluate space use since renovation and improve it as needed and as possible; gather information about possible land acquisition and building expansion to find out whether a larger library is wanted and what would be required to start such a project

Measurement: Check off strategic plan items as accomplished.

Tasks:

- 1) Evaluate layout of facility and rooms for easy, logical navigation **Q1-18**
 - a. Use comments from Strategic Plan survey and focus groups.
 - b. Do additional patron and staff surveys specifically on layout and navigation Consider changes that will work within overall intent of renovation layout.
 - c. Consider other ways to mitigate perceived problems with layout, such as floor plan maps, different signage, etc.
- 2) Evaluate placement and flow of materials and collections. **Q1-18**
 - a. Use comments from Strategic Plan survey and focus groups. Use additional survey specifically on layout and navigation (5.1.b.).
 - b. Consider changes that will work within overall intent of renovation layout.
 - c. Consider other ways to mitigate perceived problems with layout, such as floor plan maps, different signage, etc.
- 3) Explore long-term possibilities for expansion of existing facility or a new building. **2019-2020**
 - a. Investigate whether neighboring properties might be purchased – find out when, cost, possible sources of funding.
 - b. Create timeline and plan for acquiring funds, purchasing land, etc.
- 4) Evaluate existing building and grounds for upcoming repairs or enhancements that may be needed. **Q2-18, ongoing for possible construction grant in Q4-2019**
 - a. Ask maintenance staff and cleaning contractor to examine building and make list of problems and potential problems.
 - b. Use back files and corporate memory to find out what has been done and when.
 - c. Ask staff, Friends, and volunteers for ideas on areas needing work or improvement.