



Free Library

Media - Upper Providence

Strategic Plan 2017



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Section I: Background

Introduction

The Media-Upper Providence Free Library has a rich history dating over 115 years. The Library was founded by the Woman's Club of Media in 1901. The Library serves the 15,000 residents of Media Borough and Upper Providence Township. The Library boasts 9,000 active cardholders. Over 100,000 patrons enter the library each year. The Library is a member of the Delaware County Library System whose activity is greater in the past five years, than the previous ten years, and usage is growing.

The Library is a true community hub. Located in the heart of Media's business community, it is a cornerstone of Media's 'walkable community' plan and is distinguished by being accessible by public transportation. The Library provides a safe, welcoming environment that offers our community print and digital materials, computer resources, access to free programming and meeting space.

In 1949, a civic-minded school teacher, Matilda Sprogell donated her school buildings on the corner of Front and Jackson Streets in the heart of Media Borough with the express intent that a library be maintained at the site. Miss Sprogell also established an irrevocable Trust which generates a modest return for the Library. Over the years a series of additions to the original buildings resulted in the cobbling together of five buildings creating disjointed spaces and limited accessibility. While this growth represented the thriving use of a municipal library, as inspired by the original donor, it had resulted in a building that had lost its practicality.

The Library remained a valued cornerstone of the community, but structural and space constraints restricted the ability to grow and flourish. Further, over the years, the infrastructure, heating, plumbing and roof had been repaired extensively, and were no longer viable to repair.

Thus, in 2011 the Board of Trustees of the Library committed to a rebuilding project. After a great deal of evaluation and planning the capital campaign was launched in 2014 and the new building opened in 2016 to great acclaim.

The new library is a 10,000 sq. ft., two story building. The floor plan includes designated areas for toddlers, children, young adults, adults, and a computer access center, while maintaining free Wi-Fi throughout. The new library addresses issues of public safety, patron flow, and accessibility and includes space for programming and public meetings, accommodating large and small groups and simultaneous programs. The overall design is flexible

to accommodate future growth and changes in the way the public uses a library. Energy-efficient HVAC, windows and lighting was implemented and the design provides for handicapped accessibility by installing ADA-compliant entrances, bathrooms, an elevator and designated parking.

The project, which was an historically significant one in the borough, was funded by a commitment from local government, PA Department of Education (Keystone Grant), the community and foundation grants. While the majority of the \$4 million dollar project was funded as described above the trustees also borrowed \$1.5 million dollars from the Borough of Media, piggybacking on a bond they had attained for the purposes of other capital projects on their docket.

Results of the Last Strategic Plan

The new building was the remaining piece of the Library's 2006 Long-Range Plan. Other tasks from that plan included:

- Development and expansion of services and programs
- Improved publicity for library services and programs
- Updating and expansion of collections
- Planning for administrative and fiscal stability.

While the rest of those tasks were completed within the timetable set in the original Long-Range Plan, the building project was put on hold for a time due to the economic down-turn in 2008. (A five-year update to the 2006 Long-Range Plan is appended to this document.)

Why a New Plan?

The motivation for the development of a new Strategic Plan is two-fold:

- The need for a new planning map, having completed all of the tasks outlined in the 2006 Long-Range Plan
- The redefinition of the library as a result of the building project.

Deliberate, clear and well-communicated planning is the keystone of a healthy organization, particularly not-for-profit institutions. It provides a blueprint for growth and a tool for decision-making.

The process of planning for the new building pulled together numerous community members, created new relationships and broadened expectations for the organization. With the completion of the building it became clear that the library as an organization and the people involved had grown in many ways. The new building provides opportunities for programs and services

that were previously at best unlikely and at worst impossible. The board and staff wrestle with questions about how best to use this wonderful new facility. How do we want to redefine the library? This question becomes even more important when combined with the fact that the library is now more visible than ever before.

Additionally, with the new debt service needed to repay the loan from the borough it is imperative that there be extensive planning around fund raising. The capital campaign that was created to fund the building in the first place provided the foundation for this fund raising but the board and staff will clearly need to capitalize on that and continue to increase fund raising activities and results.

Thus, the trustees, library director and select staff set to work on a new Strategic Plan.

The Planning Process

The officers and library director had retained the services of former Delaware County Library Director David Belanger to act as facilitator for the planning project. David had moved on to head the library department at Lower Merion township but his professional skills and history and relationship with MUPFL made him the perfect candidate for the role. After two pre-planning sessions with the officers and library director David met with the full board and library director during a board retreat in October, 2016.

The theme for the retreat was "Now What?" During the morning the group explored the things they were pleased with about the new library and the building process in general and what they learned along the way. They discussed the changing demographics in the area and its impact on and opportunities for the library. Key themes for the next stage in the library's history were identified. During the afternoon session participants established four major "buckets" for those themes as well as objectives for each of those. The buckets identified were "Building Community," "Building a Culture of Philanthropy," "Building Usage" and "Building the Board."

During the next two regularly scheduled board meetings the board, director, select staff and advisors worked to flesh out the themes with further details and action steps. An initial draft of the strategic plan was writing in December 2016 for review at the January 2017 board meeting. During that meeting the timeline was finalized and the draft approved. The Strategic Plan was then circulated among various constituencies, particularly Media Borough and Upper Providence Township councils, for comment.

The finalized plan was approved and adopted on February 27, 2017. Action Plan updates will be provided at each monthly board meeting with a full review and formal update prepared annually.

Section II: Goals and Objectives

Media Upper-Providence Free Library's (MUPFL) three-year strategic plan focuses on achieving four key goals:

- Build an engaged and invested library community;
- Ensure the Board and staff are knowledgeable, committed, and supported in their efforts to help the library achieve its mission;
- Create a warm, inviting and efficient library space; and
- Cultivate a proactive attitude of giving within the organization and across communities served.

For each goal, associated objectives and action items are identified. Responsibility for each task and accompanying timelines are identified in Section III.

There are several overarching themes within MUPFL's Strategic Plan. The Board and staff identified a strong need to focus on ***gathering and using data, research and information to guide decision-making and planning***. Data (e.g., demographics, library usage statistics) and new information (e.g., community needs and wants) will equip the Board and staff with tools to ensure library administration, services, and resources are aligned. With the changes that come with operating the new library building there is also a need to ***develop concrete plans to chart the path forward across the four strategic goal areas***. The Board and staff will create a communication plan, Board and staff training plans, as well as a development plan. And, finally, recognizing the significant contributions of community members, organizations and councils, MUPFL's Board and staff will ***engage deeply with community stakeholders to leverage expertise, insight, and resources*** on its journey to provide comprehensive library services in the new library building.

The rich history of MUPFL will serve as the foundation for the next phase of the library. With the implementation of this Strategic Plan the groundwork will be laid to ensure appropriate funds can be raised and resources maximized to address the debt service required ensuring a strong and continued future for MUPFL.

Building Connections with the Community

Goal:

Build an engaged and invested library community.

Objective #1 - Compile, analyze and share research and data.

Actions:

- Evaluate educational, cultural, and interest-based community needs
- Understand the demographics and priorities of the community
- Identify programs and services currently available in the area

- Explore new ideas and best practices (e.g., library administration, programs)
- Understand the demographics and priorities of the community.

Objective #2 - Create an environment that connects people to ideas, information and each other.

Actions:

- Develop a community council or task force to provide input and support
- Develop a range of programs, services, materials and resources that meet the educational and creative needs of our community
- Create a forum and/or series that promotes, encourages and facilitates civic discourse
- Enhance the role of the library in life-span education.

Objective #3 - Heighten awareness of the library's value to the community.

Actions:

- a. Develop a comprehensive communication plan
- b. Create and sustain partnerships that nurture advocates and engage stakeholders
- c. Define and build a recognizable image and brand
- d. Promote the role of the library in life-span education.

Building the Board and Staff

Goal:

Ensure the Board and staff are knowledgeable, committed, and supported in their efforts to help the library achieve its mission.

Objective #1 – Foster a committed and knowledgeable governing board of advocates and responsible fiscal stewards.

Actions:

- Craft tools to support board (board manual, training plan, self-assessment)
- Develop process for transfer of knowledge and leadership
- Build network for recruitment with a focus on professional skills – financial, legal, development, etc.

Objective #2 – Recruit and retain an invested, skilled team of staff who are valued and sufficient for the successful operation of the new building and programs.

Actions:

- Research best practices in library staffing models

- Assess staff skills and responsibilities and practices currently in place to support staff (e.g., supervision, training)
- Update staffing plan and supports for staff to adequately and efficiently run the new building, programs, and services in response to community needs
- Develop staff recognition and retention strategies
- Prepare staff for new leadership opportunities and create pathways for advancement.

Objective #3 – Further develop and enhance the advisory council, and leverage the expertise of its diverse members.

Actions:

- Assess alignment and identify gaps between advisory council skills/expertise and the needs of MUPFL
- Develop an advisory recruitment and engagement plan
- Provide continuity of service for pre/post board service.

Building Usage

Goal:

Create a warm, inviting and efficient space.

Objective #1 – Gather data regarding current and future space utilization

Actions:

- Develop a reporting tool that summarizes library space usage
- Gather patron and staff input about current space usage (e.g., reserving rooms, set up, availability, technology) as well as space usage needs.

Objective #2 – Refine physical space to better serve patrons and increase usage.

Actions:

- Assess and address technological shortcomings
- Evaluate security and staffing needs for the entire building, and specifically the basement and 2nd floor
- Evaluate and improve the décor throughout the building
- Provide dedicated spaces based on the needs of the community (e.g., teens, study)
- Collaborate with outside agencies to assess their space needs and increase usage.

Objective #3 – Maximize existing income streams and explore additional income streams related to space usage.

Actions:

- “Fine tune” book sale (traffic flow during sale, use of space between sales, etc.)
 - Evaluate current space usage options, associated library costs, and pricing levels
 - Identify new income streams for space usage
 - Create a marketing strategy for meeting rooms.
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Building a Culture of Philanthropy

Goal:

Cultivate a proactive attitude of giving within the organization and across communities served.

Objective #1 – Define library needs and communicate those needs to all stakeholders.

Actions:

- Define library financial status and needs
- Educate Trustees as to how one creates culture
- Research strategies other libraries use to help build a culture of philanthropy
- Educate donors and stakeholders about the library’s financial needs, how the library is funded, and the fact and impact of its non-profit status
- Establish a process to ensure the library’s debt service is integrated into the budgeting process.

Objective #2 – Create a Development Plan designed to create a culture of Philanthropy, increase friend and fund raising and retire debt.

Actions:

- Identify leadership and team for the project
- Create a plan that is tied to the budgeting process and explores/addresses:
 - Relationship building
 - Major donors
 - Estate Planning
 - Events
 - Staffing needs (for development)
 - Annual Giving
 - Goal Setting
 - The viability of a friends group
 - Capital needs
 - The role of the board and staff in fundraising.

Section III: Strategic Plan – Tasks and Timeline

Proposed Tasks and Timeline

Building connections with the community

Goal:

Build an engaged and invested library community

Objective #1 - Compile, analyze and share research and data

Action	Responsibility	Completion
Evaluate community needs – educational, cultural, interest-based	Board, Director	Dec. 2017
Understand the demographics and priorities of the community	Board, Director and Staff	Jan. 2017 and ongoing
Identify programs and services currently available in the area	Director and Staff	Dec. 2017
Explore new ideas and best practices	Director and Staff	Dec. 2017

Objective #2 - Create an environment that connects people to ideas, information and each other

Action	Responsibility	Completion
Develop a community council or task force to provide input and support	Director and Board	June 2018
Develop a range of programs, services, materials and resources that meet the educational and creative needs of our community	Director and Staff	June 2018

Create a forum and/or series that promotes, encourages and facilitates civic discourse	Director and Community Committee	June 2018
Enhance the role of the library in life-span education	Board, School District, Director	June 2018

Objective #3 - Heighten awareness of the library's value to the community

Action	Responsibility	Completion
Develop a comprehensive communication plan	Board, Director and Staff	June 2018
Create and sustain partnerships that nurture advocates and engage stakeholders	Board, Director and Staff	Jan. 2017 and ongoing
Define and build a recognizable image and brand	Board, Director and Staff	Dec. 2018
Promote the role of the library in life-span education	Board and Director	June 2018

Building the Board and Staff

Goal:

Ensure the Board and staff are knowledgeable, committed, and supported in their efforts to help the library achieve its mission.

Objective #1 – Foster a committed and knowledgeable governing board of advocates and responsible fiscal stewards.

Actions:

Action	Responsibility	Completion
Craft tools (board manual, training plan, self-assessment) and review annually	Board	Dec. 2017
Develop process for transfer of knowledge and leadership	Board	June 2017

Build network for recruitment (emphasis on finance)	Board	Dec. 2017
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Objective #2 – Recruit and retain invested, skilled team of staff who are valued and sufficient for the successful operation of the new building and programs.

Action	Responsibility	Completion
Research best practices in library staffing models	Director	*
Assess staff skills and responsibilities	Director	*
Update staffing plan to support new building and expanded community	Director	*
Develop staff recognition and retention strategies	Director	*
Prepare staff for new leadership opportunities and create pathways for advancement	Director	*

*Left blank pending new director's input

Objective #3 – Further develop and enhance a diverse advisory council.

Action	Responsibility	Completion
Assess gaps to align advisory council skills/expertise with the needs of MUPFL	Board	Jan. 2019
Develop an advisory recruitment and engagement plan	Board	Jan. 2019
Provide continuity of service for pre/post board service	Board	Jan. 2019

Building Usage

Goal:

Create a warm, inviting and efficient space

Objective #1 – Gather data regarding current and future space utilization

Action	Responsibility	Completion
Develop reporting tool	Director and Staff	Oct. 2017
Gather patron and staff input about current space usage as well as space usage needs	Director and Staff	Oct. 2017

Objective #2 – Refine physical space to better serve patrons and increase usage

Action	Responsibility	Completion
Assess and address technological shortcomings	Director, Staff and DCL	Sept. 2017 and ongoing
Evaluate security and staffing needs for basement and 2 nd floor	Board and Director	Sept. 2017
Evaluate and improve the décor throughout the building	Director and Staff	Dec. 2017
Provide dedicated spaces based on the needs of the community (teens, study, etc)	Director and Staff	Dec. 2017
Collaborate with outside agencies to assess their space needs and increase usage	Director and Staff	Dec. 2017

Objective #3 – Maximize existing income streams and explore additional income streams related to space usage.

Action	Responsibility	Completion
“Fine tune” book sale	Board, Director and Book Sale Coordinator	May 2018
Evaluate current space usage options, associated library costs, and pricing levels	Board and Director	Sept. 2017
Identify new income streams for space usage	Board and Director	Jan. 2018
Create a marketing strategy for meeting rooms.	Board and Director	Sept. 2017

Building a Culture of Philanthropy

Goal:

Cultivate a proactive attitude of giving within the organization and across communities served.

Objective #1 – Define library needs and communicate those needs to all stakeholders

Action	Responsibility	Completion
Define library financial status and needs	Board and Director	June 2017
Educate trustees as to how one creates	Board and Director	Aug. 2017 and ongoing
Research strategies other libraries use to help build a culture of philanthropy	Board and Director	Aug. 2017 and ongoing
Educate donors and stakeholders about the library's financial needs, how the library is funded, and the fact and impact of its non-profit status	Board and Director	Jan. 2017 and ongoing
Establish a process to ensure the library's debt service is integrated into the budgeting process	Board and Director	Feb. 2017

Objective #2 – Create a Development Plan designed to create a culture of Philanthropy, increase friend and fund raising and retire debt.

Action	Responsibility	Completion
Identify leadership for the project	Board and Director	March 2017
Identify team	Board and Director	March 2017

<p>Create a plan that address/explores:</p> <ul style="list-style-type: none"> ○ Relationship building ○ Major donors ○ Estate Planning ○ Events ○ Staffing needs (for development) ○ Annual Giving ○ Goal Setting ○ The viability of a friends group ○ Capital needs ○ The role of the board and staff in fundraising. 	<p>Board and Director</p>	<p>June 2017</p>
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Section IV: Conclusion

While the tasks are many the opportunities are great. The board and staff have the awesome responsibility of determining the future of the library while repaying significant debt. On the other hand the new space provides the ability to meet the demands of a 21st century library while retaining the hometown feel that is valued by the community and the excitement surrounding the building has created new-found energy which has pulled in all sorts of new friends and allies. The key will be to capitalize on the second to achieve the first. This document will guide the current and future board and staff as they work to do just that.

2016-17 Strategic Planning Participants

Trustees

Robin Beaver, President
Marie Sciocchetti, Vice President
Larry Chrzan, Secretary
Paul Rowe, Treasurer

Lin Axemathy Floyd
Michael Pahides
Kelly Schaffer
Doug Williamson
Robert Yosua

Advisory Council Members

Jeanne Benzel
Grant Gegwich

Library Director

Barbara Hauck-Mah

Library Staff Members

Matt McNelis
Vicki Sheeler

Consultant and Facilitator

David Belanger

Appendix A:

5-Year Update to 2006 Long Range Plan

Introduction

In the middle of a snow storm in January of 2005, 17 library trustees and the library's director held an off-site retreat with a professional library consultant to discuss the board's role in shaping the future of the Media-Upper Providence Library. Thus began an eighteen-month process of evaluation, reflection and planning which resulted in the creation of an ambitious strategic plan. The process involved not only the board's work with the library consultant but also entailed demographic studies, staff interviews, focus group sessions with members of the community and extensive research into current library trends. It culminated with the arduous task of blending all of the research, feedback and brainstorming into a cohesive plan, designed to meet the specific wants and needs of not only the library but those of the Media and Upper Providence communities as well. The final document, *The Future of the Media-Upper Providence Free Library; Long-Range Planning Report*, covered library history, a description of the planning process, itemized goals and objectives and a proposed timeline.

Library trustees and staff have worked tirelessly over the last 5 years to move forward with the goals and objectives outlined by the report and have made great strides in achieving many of the tasks set for them by the Long-Range Plan. Thus we find ourselves in a position to take stock of our progress and begin planning for the immediate future of the library. This document serves as a sort of interim report, recapping our progress and outlining those next steps.

Progress Report on 2006 Tasks and Goals

Task: Continue to develop and expand services and programs.

Goal: Develop new program initiatives to address the changing needs of the community

Goal: Continue to develop and support outstanding library staff

Progress Report:

- Technology training opportunities for patrons have increased, providing one-on-one sessions as well as group instruction.

- Programming for both retired and youth patrons has also increased, offering a wide range of events and activities for patrons in these age groups.
- A network infrastructure has been created for the administration of the library.
- Wifi access to the Internet is now available to patrons with wireless devices.
- A curb-side book drop was installed to facilitate ease of library use for non-walking patrons.
- While there is a strong collaborative relationship with the leadership of Media Borough, trustees have focused some real effort on reaching out to the Upper Providence council members in an attempt to form a more effective and productive relationship with that community's leadership.
- The staff and trustees continue to explore ways to support the Upper Providence community and commuting patrons. This continues to be an area of focus.

Task: Better publicize the library's services and programs.

Goal: Improve the marketing of the Media Upper-Providence Free Library

Goal: Improve and better utilize the library web site

Progress Report:

- One library staff member has been designated as the PR contact and a specific part of her time is spent publicizing library services and events.
- Library staff members regularly attend Rotary and other community group meetings.
- The library continues to participate in the Media Arts Council's Second Saturday events during the more seasonable months.
- The board worked with a graphic designer to develop a new logo and branding strategy.
- A transitional library website using a Word Press template has been totally redesigned, providing easier access to library news and resources. A brand new, more robust, yet flexible website is being designed and will be launched in the coming months.
- The transitional website can be maintained directly by library staff as will the new one.
- Library staff regularly uses social networking sites to keep the community informed and involved.

- Library programs and news are posted on community-based blogs (maintained by non-library personnel).
- The library is involved in a collaborative initiative with non-profits in the Media area.
- The board and staff have hosted several social/informational events in the community to increase awareness of the library and its programs.

Task: Update and expand the library's collections.

Goal: Update and expand the library's collections to reflect community needs and expectations.

Progress Report:

- A collection development policy was drafted and approved in October, 2007.
- The library collection is routinely weeded and assessed for currency and interest.

Task: Expand and modernize the library's physical plant.

Goal: Improve overall appearance of library building and grounds

Goal: Plan for renovation/expansion of library facilities to meet current and future needs.

Progress Report:

- The basement of the library was totally cleaned out for hygiene and safety purposes.
- All of the windows in the library have been replaced.
- The roof has been patched and repaired.
- A new alarm system has been installed.
- Plumbing issues have been addressed.
- Landscaping needs have received attention but continue to be a problem.

The library truly needs a complete overhaul in order to meet the safety and programming needs of our patrons and the needs of the community at large. The library trustees and director began working with an architect in 2007 to being exploring renovation options. Once the recession hit in 2008 these plans were put on hold and we began the process of simply attempting to maintain the current plant. In the spring of 2011 it was decided to resume the renovation process and the services of an architectural firm were secured. The board and director are currently moving forward with the

project from both building and fundraising perspectives. We have been working with architects to begin planning for renovation and a development consultant to work on raising funds for the project. For further information on the project please see our Case Statement.

Task: Create a plan to provide for administrative and fiscal stability for library.

Goal: Fund goals and objectives as described in this document.

Goal: Create a sound financial plan to support future growth of the library.

Goal: Develop and sustain effective Board of Trustees and related committees.

Progress Report:

- The library's fiscal situation was totally re-evaluated and documented in 2009-2010.
- Changes were made to improve the accounting system.
- The board changed banks to an institution more aligned with our financial requirements.
- Our status as a non-profit entity (501-3C) was reviewed and confirmed.
- A database of donors has been developed, expanded and maintained.
- The board and director planned and implemented a targeted annual giving campaign, resulting in a four-fold increase in donations.
- Several small grants have been applied for and received.
- Larger grant opportunities are being explored and acted upon.
- Board members have increased attendance at professional development programs.
- The board of trustees now serves in a slightly supervisory role for the book sale. A change in book sale leadership has resulted in some difficulties with the book sale volunteers. This is being addressed by the board and library staff.
- The Nominations committee continues to recruit board candidates based on skills sets and experience.
- A "Friends of the Library" group was established in 2007. However, after struggling to truly get the group off the ground it was decided to put the group in "hibernation" until a later date.
- An ad hoc technology advisory group composed of community members has been created and has helped to address several of the library's technology needs.

Moving Forward

The largest outstanding tasks for the library continue to be increased fundraising and addressing our building needs. We are working with both Media Borough and Upper Providence Township to increase funding for our operating budget. Both entities have responded positively to these requests with the borough steadily increasing funding at a rate of 10-20% each year and the township gradually increasing their funding to within \$30,000 dollars of the borough. We have also apprised each of them of our renovation plans and our hope/expectation that they will contribute to our capital needs for this project.

As stated earlier in this document, the library is in dire need of a thorough renovation, not only because it is an old building in need of an update but, more importantly, in order to meet the needs of the library and the community it serves. As indicated previously, more information about the renovation project can be found in our Case Statement.

The Board remains committed to the premise that the Media-Upper Providence Free Library is uniquely positioned and located to become a center of information, technology and learning, that in turn will contribute to economic and educational opportunity in our communities.

Spring 2012