

Norwich Public Library Strategic Planning

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Executive Summary

Norwich Public Library (NPL) has a history of forward thinking with its deliberate intent to plan for a fiscally sound and substantive future. It contracted in 2021 with Empower Success Corps (ESC) to conduct a strategic planning process to design a workflow that would carry it through 2025. The consultation occurred in three phases - environmental scan, review of mission/vision/goals, and the development of a work plan with action steps toward successful completion.

Norwich Public Library is strongly respected in its community, not only for its delivery of traditional library services, but also for the way it delivers those services, its rapid response to COVID, and its flexibility in dealing with the expectations of a well-educated and age-diverse community. It is also significantly supported by annual appropriations in the town's budget and has, as well, an independent "friends" group that raises additional funding support.

All of this was substantiated in ESC's surveys (both personal individual conversations and a community survey). Those results, combined with a review of relevant documents provided by NPL, the outcomes of a SWOC analysis, a review of the mission statement, and ongoing conversations within the strategic planning committee led the committee to identify five goals for the 2022-2025 Strategic Plan. The SWOC and community survey led ESC to identify the three primary age groups or stages which NPL serves – younger with children, mid-life, and retired adults. This lens enabled ESC to recognize that collections preferences, usage, subject interests, and even the timing of events, varied among them.

Goal 1 was in direct reaction to the community response that they wanted NPL to be a place of learning.

NPL will develop innovative educational opportunities and diverse, quality collections to meet the specific interests and needs for different audiences.

Goal 2 recognizes that technology in all its iterations will play a growing role in how libraries operate, and how their users will interact with board, staff, and the collections.

NPL's technology will ensure accessibility to meet the evolving needs of its patrons, staff, and the broader community. NPL will investigate best practices while addressing the need to update technology and continually respond to the needs of the community.

Goal 3 reflects the community's expressed interest in NPL continuing to serve as a center of community life.

NPL will foster an environment where the community will engage and connect.

Goal 4 builds on Goal 3 in that it addresses the very presence of the Library.

NPL will create interior and exterior flexible spaces that are welcoming, accessible, and appropriate for a wide range of activities and community interactions.

Goal 5 undergirds the others, focusing on the financial future of NPL.

NPL will ensure the long-term financial health and sustainability of the library.

Each of these goals has multiple action steps to achieve completion with time lines that provide for thoughtful and sequenced implementation. Importantly, each action step has an anticipated outcome and well as a champion who will assure that the tasks are completed in timely fashion. Required financial resources, though not separately articulated in the workplan, will be developed and forwarded to the treasurer and finance committee for incorporation into a five-year financial forecast which will enable NPL to be proactive in implementing change.

In sum, it is a plan that will allow the Norwich Public Library to be both responsive to the community it serves, to be responsible stewards of the funds it oversees, and to be a cutting-edge, small but effective community resource.

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Norwich Public Library Strategic Planning

Introduction

Norwich Public Library contacted Empower Success Corp (ESC) in the spring of 2021 to discuss the need for a strategic planning consult to assist with their next strategic plan. NPL has created strategic plans in the past, the most recent ending in 2019. While previous strategic planning was conducted without outside assistance, it was felt that the perspective of experienced, outside consultants could be helpful and, additionally, the current staff and Board did not have the bandwidth to manage the process. The staff was deep into the new world and workload that the COVID pandemic thrust upon them.

In May 2021 the Norwich Public Library voted to hire ESC and agreed to assemble a strategic planning workgroup to work with ESC to create a three-year strategic plan. The NPL Board members on the six-person strategic planning committee were Mark Lilienthal (Board Chair), Leslie Rimmer (Board Treasurer), and Tricia Spellman. The staff members on the committee were Lucinda Walker (NPL Director), Lisa Milchman (Assistant Director) and Roger Arnold (Community Engagement Librarian). The initial committee meeting, held in June of 2021 was held in-person at the library, before which, the ESC team (Rebecca Hutchinson, Maggie Ford, Carol Ann Moore) received a tour of the library and grounds by Lucinda. The work of the committee began in earnest in July 2021.

There are three phases to the ESC strategic planning process model:

- Phase One – The Environmental Scan

- Phase Two – Vision & Goals

- Phase Three – Strategies and Action Steps

The following report details the work undertaken by the committee, as facilitated by ESC. The report concludes with a detailed work plan intended to provide the entire NPL Board and staff, when working together, the steps to successfully move NPL forward

Phase 1: Environmental Scan

The purpose of the environmental scan was to provide the context and foundation for the direction of the strategic plan. The environmental scan included a review of the financial status of the Library, interviews with thirteen community stakeholders, chosen by the NPL Strategic Planning Committee and a 15 question community survey advertised broadly by the NPL Committee and completed online by respondents. The survey was completed by 235 individuals over a 3-1/2-week period in November.

Financial Review

The Norwich Public Library is in the fortunate position of having strong support from the Town of Norwich, which contributes roughly 75% of its annual budget. The Annual Appeal, which runs year-round, provides the 2nd largest source of annual income. These two combined account for roughly 94% of NPL's annual budget. Friends of NPL, which raises funds for the "extras," is a separate 501(c)3 and does not contribute to the regular operating budget.

The NPL Fact Sheet of June 2021 reveals strong, thoughtful management of a small local library that reaches far beyond what might be expected. The Town is fortunate in having a library that, in many ways, provides cutting-edge services beyond its size and scope. It is heartening to know that the Town responds with strong annual budgetary support.

Bylaws

The Bylaws are what one would expect and hope to find in a small nonprofit. ESC noted that the Executive Committee does not include the Secretary when s/he is one of the officers. This appears to be an oversight?

Interviews with Community Stakeholders

The three-person ESC consultant team interviewed thirteen stakeholders identified and chosen by the NPL Strategic Planning Committee. They included library users of all ages, some with children, some without. Representatives of both businesses and nonprofits were included as well as town and school officials. The interviews were conducted by phone in late summer, 2021.

The interviews with the thirteen stakeholders were typically 20 – 45 minutes in length. (See Appendix 1A – Stakeholder Interview Questions)

Some clear themes stood out in the interviews. Stakeholders appreciated the quality of the Director and the staff, and they are universally respected. "They treat you like a friend!", "There are smiles every day." "They even bring books to my home." Children's programming is seen as a strength. In addition, many were astonished how quickly the staff switched gears to address the closed down pandemic world. NPL's response to COVID was resourceful and provided patrons and town residents with services that might have been curtailed by a less responsive library.

Perhaps the strongest theme was the belief that the Norwich Public Library is, and should be, much more than a place that lends books. Repeatedly, the respondents referenced the Library as a place for connecting – connecting with friends, families, and other community members, connecting with ideas, connecting with experiences, connecting with resources, connecting with the Internet. Without exception, the thirteen respondents believe the library staff has a strong commitment to "follow the community" and address the needs that arise. All were happy with the Library as a center of community life.

Another theme was that communication about Library events, new books and programming appears strong.

When stakeholders were asked about possible additional services in a post-pandemic world, there were some recurring themes. Many of the respondents mentioned how helpful the curbside pickup was and they hoped it would be continued. Several mentioned how lucky Norwich is to have the Library within walking distance of both the school and senior housing. They could imagine more formal relationships with both the school and senior housing community.

Several hoped there would be more offered for seniors, perhaps including discussion groups on a variety of issues such as housing, literacy, voter information especially on local issues, not candidates. One suggested that the Library staff go to the senior housing with programming on some kind of regular basis.

The single concern expressed was a hope for a cozy, quiet space for reading where there's no music/noise.

When thinking about the future, several respondents began by saying what they hoped would NOT happen – they specifically expressed the hope that books, hardcopy books, will still be paramount. Clearly there is a fear that the move to e-books, on-line programming, etc. will cause books that we hold in our hands to become secondary.

The pandemic did not seem to reduce the interest for hardcopy books and real time learning opportunities. Rather, it expanded the wish for a reliable combination of both virtual and real time options.

To gather additional input and to test the conclusions from the stakeholder interviews, the strategic planning committee chose to conduct a community survey, which began in late October 2021.

The Norwich Community

According to the Census Bureau' [American Community Survey \(Dec. 2019\)](#), Norwich is a town with a population of 3335 and 1290 households located just across the Connecticut River from Hanover, NH, the home of Dartmouth College. Norwich residents are generally well educated, with 81% of residents having obtained a bachelor's degree or higher. The median age of residents is 45 years.

The Community Survey

Survey Monkey was used for the community survey. While SurveyMonkey is an online application, provision was made for hardcopy survey submission as well. To reach potential respondents, the NPL Strategic Planning Committee advertised the survey through a variety of online and hardcopy channels, at the Library, and through networking.

Two hundred and thirty five (235) surveys were submitted. If we can assume that only one member of a household submitted a survey, this represents a response rate from the community of 18%, typical for this type of survey.

The survey questions are included in Appendix 1B. Charts used in analyzing responses to the questions for different constituencies are provided in Appendix 1C. The answers to each question for the total sample are provided in Appendix 1D.

Results of the Community Survey must be considered within the context of the COVID pandemic at the time of the survey (November-December, 2021). We are already further along toward what will become our “new normal.”

The Respondents and the Norwich Community

Who responded and how representative of the community are the respondents to the NPL survey?

The US Census Bureau American Community Survey, December 2019, reports that families form 67% of the households in Norwich. It is not directly evident how many families are represented in the NPL survey. However, 54% of respondents live in multigenerational households (Figure 1, Appendix 1C). To look at generations in the household, the age categories in Question 15 were collapsed into six “generations” or “life stages”: Preschool, Elementary, Teen, Younger Adults, Midlife Adults, and Older Adults. (Figure 2, Appendix 1C)

This life stage categorization was helpful in understanding the NPL survey sample and in comparing survey demographics and Norwich population demographics reported by the US Census Bureau. The “ages of people in your household” showed a distribution similar to the Norwich population overall. (Table 1, Appendix 1C).

Three clusters or types of families based on life stage were found: families with younger adults and small children, typically preschoolers and elementary school children; families with midlife adults, teens, and elementary school children; and older, retired adults (Table 2, Appendix 1C). Since these clusters may have different interests and needs in using the library, they represent different constituencies for the Library.

We have viewed the results of the survey through the lens of these three constituencies represented by the life stage or generation of adults in the household: younger with children, midlife, and retired adults. Looking at the big picture, the survey results suggest that NPL will want to consider these market segments in designing and marketing programs and resources.

What attracts respondents to use the Library

The Library collections are the strongest attraction for respondents. Next, they want to learn something new, to have a quiet, comfortable place to read and study; to benefit from the readers' advisory; and to hold or attend meetings of local groups. Emphasis varies with generation. For younger and midlife adults with families, having a place where children can go after school is important. Of particular note is that all generations showed an interest in learning. For older adults, learning something new was second only to the Library collections. What types of learning are respondents interested in?

Programming and the pandemic effect

The community survey results suggest that, of the new services initiated by the Library during COVID, curbside pickup, as well as prioritized funding for increased e-book and e-audio collections, should be continued post-pandemic. Some generational differences emerged, with younger adults interested in continuing craft kits and outdoor programming, while older adults were more interested in continuing remote delivery of programming and information, i.e., digital magazines and virtual programming (Figure 5, Appendix 1C).

Respondents would also like to see a number of Library services and activities return that were offered before the pandemic. Again, there are generational differences. Not surprisingly, younger adults with young families are more interested in the return of Story Time and weekly after school activities, while older adults are more interested in tech help and book discussions. Midlife adults were also interested in weekly after school activities for older children. All generations, especially midlife and older retired adults, would like programming for adults (workshops, lectures, movie series) to return (Figure 6, Appendix 1C).

With regard to programming, adults mentioned interest in climate change and environmental sustainability, education, and equity and inclusion. Next of importance is the social infrastructure: housing, public health, food systems, elder care and, for younger adults, childcare (Figure 7, Appendix 1C).

NPL survey participants frequently expressed an interest in more than one means of delivery, for example, in-person and hyflex. Across generations, many checked blended (hyflex), which allows them to *choose* the format they prefer (in-person OR virtually) at the time of the event. (Figure 8, Appendix 1C).

As would be expected, when an event occurs also has an impact on participation for the earlier mentioned constituencies. The survey provided guidance regarding the preference of the three constituencies mentioned above.

Accessing Library resources

Respondents from all generations uniformly access the Library resources in-person (74-78%), through digital resources (47-56%), and curbside pickup (41-53%). About 30-40% of respondents in each generation accesses some Library resource at least once a week, and 30-35% accesses a Library resource at least once a month (Figure 10, Appendix 1C).

Respondents from all generations prefer hardcopy (hold in your hand) books and magazines over digital equivalents. Younger and midlife adults prefer e-audiobooks more than older adults, who in turn prefer streaming video more. Older digital media (CD, DVD) are not preferred as much as electronic delivery. For example, e-audiobooks are preferred more than audiobook CDs; streaming video more than DVDs. (Figure 11, Appendix 1C)

Why respondents may not use the Library, the pandemic again

Everyone's life has been changed by the pandemic. COVID restrictions were the primary reason for families not to use the library at the time of the survey (November 2021), although access to other resources for information or entertainment also figured into their choices. Nearly half (40-47%) of each age group have access to other sources of information and entertainment. A couple respondents mentioned the limited selection of e-books at the library. (Figure 12, Appendix 1C)

Advertising Library programs and events

All generations (85-89%) look to the local listservs to learn what is happening locally. Daybreak and local newspapers are also utilized for information on local events, especially by older adults. Word of mouth is second only to local listservs. It is worth noting that Facebook, Twitter, Instagram are not prominent for the delivery of information about Library programs and events. Only 20% of the younger adults identified FB as an information source and the other social media outlets rated significantly less. (Figure 14, Appendix 1C).

Phase 1 Conclusion

In the Engagement Letter with ESC, NPL noted two questions the Library sought to address with this Strategic Plan: 1) the role of the Library in the Norwich community and 2) who NPL serves. The Phase One activities addressed these questions directly. The Library primarily serves the three life stages we identified in this analysis. The community engaged with the Library wants

an active library which offers more beyond books and Story Hour. The Norwich community expects their library to offer relevant and engaging learning opportunities and community building.

Phase 2: Mission and Goals

In Phase Two of the strategic planning process, the committee reviewed the library's mission statement and undertook a SWOC (Strengths, Weaknesses, Opportunities and Challenges) analysis. During this phase, ESC often facilitates a retreat with the full non-profit Board and sometimes includes community stakeholders at this retreat. ESC presents the Phase One findings and facilitates a goal setting discussion. During the pandemic when in-person meetings were not possible, different organizations have chosen a variety of paths. NPL felt waiting until an in-person event could be held was a priority. Discussion focused on the idea of holding a summer outdoor "kick-off" event when moving into the implementation stage of the strategic plan.

Mission Statement

The Norwich Public Library serves as a community center for the town providing traditional and innovative resources for all patrons and offering library experiences that support education, imagination, and community engagement.

The committee felt the current mission statement needed some language updating but overall, captured the commitment to be a center of community life, offering expanded education and learning opportunities and community connections. ESC advised that some organizations do not have both mission and vision statements and the committee felt the mission statement accurately captured the NPL goals and an additional vision statement would not add any needed direction.

SWOC Analysis

Each individual committee member was asked to identify strengths and weaknesses of the library as well as opportunities and challenges. Strengths and weaknesses are generally defined as to reflect the library *currently*; How is the library perceived today? Opportunities and challenges are seen as looking toward the *future*. What do you see down the road for the library? With this exercise a group can effectively identify commonly - perceived goals for the future.

Strengths

The committee concurred that NPL strengths included a well-resourced and educated community with highly engaged patrons and Board of Directors. This results in a community that supports NPL with strong, reliable funding. The engaged and expert staff offers years of experience which has developed an impressive breadth and quality of programming and collections.

Weaknesses

Current weaknesses identified included the lack of a clear goal-oriented development path which could result in a risk averse, reliance on past ways of being rather than an embracing of new avenues. A goal of the previous strategic plan to have flexible inside and outside spaces that could be reconfigured was not actualized; digital platforms were confusing, hard to use; and the website needs updating.

Opportunities

Emerging from the pandemic offers the perfect time to reassess many NPL practices – What still works? What should we ditch? Creation of this strategic plan offers the opportunity to engage the full Board. What does a cutting edge library look like? The committee noted that with a new children's librarian this is the opportune time to build and expand the relationship with the school and library. There may be an opportunity to develop a capital campaign to address the internal building limitations and expand on the outdoor space for relaxation and programming.

Challenges

COVID has been no small challenge and the staff is exhausted. There is increasing turnover in town residents which results in NPL losing volunteers and support. There was concern that it is an ever-present challenge to successfully make the NPL message heard amidst daily life's noise and demands. Keeping up with technology changes will always be a challenge.

There appears a yet to be addressed issue regarding funding – how much should the town contribute to the library? Should there be a different balance of town contribution v private fundraising? Most people still don't know how NPL is funded. The NPL Board should set aside some time to deliberate future fundraising. Do they need to augment the town support for items/areas beyond the basics which the town supports? When their space assessment is complete, should they launch a capital campaign for new or modified space and equipment? And, if so, who will be their major donors and how will they be cultivated in the meanwhile?

Phase 3: Goals, Strategies and Action Steps

Phase Three, creating strategies and action steps, is essential to a successful strategic plan. With this process, a specific timeline of activity is identified to achieve each goal. The goals are *what* the committee seeks to accomplish, the strategies are *how, or* what avenues will be traveled to meet those goals and the actions outline the *action steps*, using the identified strategies needed to accomplish the goals. There is a date identified within the three year timeline for each goal and an *owner or champion* for each goal has been identified for four of the five goals. The owner is listed, followed by other expected participants. While the owner is not expected to complete the work him or herself, the owner agrees to make sure work is done to reach the goal and not forgotten or put on a shelf, never to be addressed again.

The committee identified five goals for this three-year strategic plan:

Goal One:

NPL will develop innovative educational opportunities and diverse, quality collections to meet the specific interests and needs of different audiences.

The committee received some ideas during Phase One regarding potential activities for the Library to undertake but more work is required to identify the interests of library patrons. A diversity audit will be undertaken and a plan to foster stronger working relationships with the school and other organizations will be part of the work to achieve the goal of meeting the interests of various Norwich populations.

Goal Two:

NPL's technology will ensure accessibility and meet the evolving needs of its patrons, staff, and the broader community.

NPL will investigate best practices while addressing the need to update technology and continually respond to the needs of the community.

Goal Three:

NPL will foster an environment where the community will engage and connect.

With the commitment to be a center of community life, NPL will create two – way communication avenues that ensure patrons' feedback is welcomed and that support a culture of learning and engagement.

Goal Four:

NPL will create interior & exterior flexible spaces that are welcoming, accessible, and appropriate for a wide range of activities and community interactions.

Previously, plans have been developed regarding the interior space. The previous strategic plan included a very similar goal. This strategic plan will move this important undertaking to the next step, with a community lead task force to develop a facilities master plan.

Goal Five:

NPL will ensure the long-term financial health and sustainability of the library.

This final goal addresses the question of funding at NPL. With identified costs identified to achieve stages of the strategic plan, a five-year financial forecast will be made and the issue of funding diversity will be addressed. If the facilities master plan (Goal 4) identifies a need for major capital funding, a capital campaign will be considered.

Strategies, Actions, Outcome Measures, and Ownership

The Work Plan Summary by Goals (Appendix 3A) provides the step-by-step actions with time line, owner and outcome measurements for each goal. The NPL Strategic Plan Work Plan (Appendix 3B) provides a visual overview spread out over the three years. This will give the NPL Board a quick way to identify what activities will be undertaken at what time and what activities will be concurrent.

Conclusion

Norwich Public Library is currently deeply respected and appreciated, for good reason, by the Norwich community. Rather than choose to keep doing what they are doing, NPL continues to strive to excel and this strategic plan is ambitious and comprehensive. It reflects the committee's resolve to be a library that goes far beyond quality collections and outstanding learning opportunities. They strive to be a future-embracing library, a hub of learning and connection in the community and to nurture a culture of two-way engagement where the community regularly gives the staff meaningful feedback, supports their professional development.

We believe this can be achieved if the Board actively stays on course with this strategic plan. We recommend that the strategic plan becomes a standing agenda item at Board meetings with regular updates from each goal's owner/champion. Refer to the outcome measures when checking status of work on each goal.

The strategic planning committee noted that there are several people living in Norwich with architecture/design/construction expertise that could be tapped to own/champion Goal #4 regarding the interior and exterior space. Unfortunately, they were not able to nail down a commitment before our planning process concluded. It was noted that a previous strategic goal regarding the internal space was not achieved, perhaps in part because of lack of community commitment to this goal. This effort is best driven by a community member, rather than the Library Director. We strongly recommend that a community member be identified as soon as possible to champion this goal.

While discussing potential outcome measures, the idea of creating a dashboard to inform the public regularly, to tell the stories that help create a culture of communication and engagement surfaced. We see the potential value of this type of communication tool and hope it will be further explored while addressing Goal #3 regarding fostering an environment of engagement and connection.

Following this strategic plan, the Norwich Public Library will be responsive to the community it serves, be responsible stewards of the funds it oversees, and be an effective cutting-edge community resource.