

DEDHAM PUBLIC LIBRARY

STRATEGIC PLAN FOR FY 23-26



APPROVED BY THE BOARD OF LIBRARY TRUSTEES
September 29, 2022

A handwritten signature in blue ink that reads "Shirin Baradaran".

Shirin Baradaran
Chair of the Board of Library Trustees

Prepared by: Harrington Management International

CONTENTS

Executive Summary	3
Organization Description And History	5
Strategic Planning Process	7
DPL Core Statements	11
Strategic Goals And Objectives: FY 23-26	13
Appendix 1: Goals, Objectives, And Key Performance Indicators (KPIs)	16
Appendix 2: HMI Reports	28
Appendix 3: The Value Of Planning	29
Appendix 4: Monitoring, Evaluating, And Communicating The Plan	31

DEDHAM PUBLIC LIBRARY

STRATEGIC PLAN FOR FY 23-26

EXECUTIVE SUMMARY

The Dedham Public Library (DPL) finds itself at a critical and potentially transformative time in its history. During the past few years, DPL has faced a number of daunting challenges such as: the appointment of a new Library Director; the appointment of a new Board of Trustees; the closing of the Library due to the Covid-19 pandemic; and the need to support both staff and the community served by the Library during the pandemic. In the midst of all of these obstacles, however, the Library has managed to select an energetic and visionary new Library Director, retained and reinvigorated its staff, and set upon a course to aggressively reimagine the potential for the Library in the community it serves for years to come. The cornerstone of this renewed commitment to push the institution to new heights is manifested in its new three year strategic plan.

This Strategic Plan is intended to, among other things:

- Address immediate and long-term physical infrastructure issues in both library buildings.
- Create a plan for long-term financial stability for the organization to allow it to engage in more creative solutions for its constituents.
- Continue, and expand upon, the Library's commitment of service to the community.
- Establish a new vibrant and identifiable brand and reputation for the Library.

The Library's Board of Trustees retained the firm of Harrington Management International (HMI), a management consultancy located in Osterville, Massachusetts, to facilitate the strategic planning exercise. A description of the strategic planning process utilized by HMI is contained later in this report, along with the results of the various fact-finding exercises associated with this effort.

As a result of the planning process, the Library's Strategic Planning Committee was able to create new core guidance statements for Mission, Vision, and Value and to establish the following five organizational goals for the next three years:

- **To undertake action to address the deficiencies in the physical infrastructure of the Library that impede DPL's ability to meet our mission and vision.**

- **To establish and implement a comprehensive marketing and communication plan for the Library to increase visibility and usage.**
- **To partner with key organizations in the Town of Dedham to leverage complementary strengths and resources creating greater community impact.**
- **To create a comprehensive funding program to support major library initiatives.**
- **To enhance and implement ongoing professional training and development programs for Trustees and Staff to maintain a culture of learning and continuous improvement.**

This document outlines the strategic planning process and contains the goals, objectives, and key performance indicators (KPIs) developed for the DPL Strategic Plan. Accompanying each individual goal is a set of specific objectives to support these goals. A description of each goal and its companion objectives can be found later in this report in Appendix 1, along with KPIs necessary in order to successfully implement this plan.

The Key Performance Indicators and Action Plan Timeline related to these established goals have been prepared by the Library's Director, Amber Moroney, in consultation with HMI, the Board of Trustees, and Library Staff, to ensure that the full extent of the organization's resources will be utilized and maximized in the implementation of this strategic plan.

ORGANIZATION DESCRIPTION AND HISTORY

The Dedham Library began in 1794 when the First Parish Church organized the Social Library. The minister kept the books in his house, issuing them for circulation only on Mondays.

On November 24, 1854, Dedham residents founded the Dedham Library Association. The new Library, which opened February 1, 1855, was housed at 630 High Street, with Dr. Samuel Adams as the librarian.

An act of legislature chartered the present Dedham Public Library on March 24, 1871.

Throughout 1871, a campaign took place to raise funds for the new Library. Charles Bullard bequeathed \$3,000 to the Library and an additional \$4,200 was raised by townspeople; the Town appropriated \$800 to fund the Library. The Library Association endowed their books to the new public library.



The first Dedham Public Library opened on February 20, 1872 and was located in a rented room over Thomas J. Baker's store on the corner of Court and Norfolk Streets. Francis M. Mann, a long-time member of the Library Association, was appointed as the librarian.

A bequest of \$10,000 from John R. Bullard in 1882 and \$10,000 from Hanna Shuttleworth in 1886 allowed the Library Trustees to purchase property and erect a new Library on the corner of Church and Norfolk Streets, the site of the current Main Library. Boston architects Van Brunt and Howe designed the Main Library with a Romanesque/Southern France style; the exterior is Dedham pink granite and red sandstone trim.



Throughout the years, small branch libraries were located in different areas of Dedham including West Dedham (now Westwood), East Dedham, Oakdale, Riverdale, and the Capen.

In 1952, the Main Library underwent a major transformation which resulted in the children's wing and basement program space being added, reconfiguring the main entrance, and renovations in the adult area. This is the current state of the Main Library.

In 1973, the Library acquired the carriage house from the Endicott Estate and converted it to the Endicott Branch Library.



The Dedham Public Library joined the Minuteman Library Network in 1993, which allowed Dedham residents to have access to resources and services from other Massachusetts libraries. In 2003 the Minuteman Library Network transitioned to a new online system giving patrons easier access to the online catalog.

Continuing to transition, as new technology became available through the Minuteman Network, the Library began offering patrons access to digital audiobooks and ebooks through Overdrive in 2009. The Library's digital collection and usage has continued to grow since that time and now includes resources from Libby, Hoopla and Kanopy.

The Library has worked to serve the community, addressing its needs and interests as best it can. Since 2016 the Library has hired specialized staff to help meet those needs including a Technology Librarian, a Youth and Teen Services Librarian, a Reading Advocate, Programming and Outreach Manager, and programming staff.

Highlights from the last ten years include:

- Expanded storytime and book group offerings
- 5k run/walk fundraisers (2016, 2017, 2018)
- The addition of an observation beehive at the Main Library (2017)
- 3d printing availability (2017)
- The addition of circulating technology including laptops and hotspots
- Free summer lunch program (2018, 2019)
- Installation of a story walk at the Endicott Branch Library (2022)

[Information provided by the Dedham Public Library, August 31, 2022]

STRATEGIC PLANNING PROCESS

THE SITUATION

In 2022, the Dedham Public Library (DPL) entered the fifth and final year of its most recent five-year strategic plan. The organization assessed the performance of its last plan as it prepared to establish its next guidance document. The leadership of DPL felt that the organization was at a critical crossroads in its development and operation. The Library had a new Library Director and new Board of Trustees. The organization was also confronting the acute need to address deficiencies in its physical facilities. This situation provided the Library with an opportunity to “reimagine” itself and its operations going forward. The consensus was that DPL’s next strategic plan must be articulate, comprehensive and visionary if the organization is to flourish during the next planning period.

This Strategic Plan is intended to:

- Address immediate and long-term physical infrastructure issues in both library buildings, including the lack of accessibility.
- Create a plan for long-term financial stability for the organization to allow it to engage in more creative solutions for its constituents.
- Continue, and expand upon, the Library’s commitment of service to the community.
- Establish a new vibrant and identifiable brand and reputation for the Library.
- Meet the requirement of the Massachusetts Board of Library Commissioners to have a strategic plan for the Library on file with that agency in order to apply for future grants.
- Be used as a framework for future administrative action that can be reviewed on a regular basis and revised as needs develop and change.

THE IMPACT

While the leadership of the Library is committed to creating a new, visionary Strategic Plan for the institution, it now finds itself in a far different operating landscape than it did when the most recent Strategic Plan was created five years ago. Therefore, it is imperative that the Library accurately, and comprehensively, evaluates its assets, strengths and the community it serves in order to carefully construct a future operating plan to succeed in its evolving mission.

THE SOLUTION

Strategic planning is the process of identifying elements of a blueprint that will help organizations accomplish their goals. It requires an organization to create goals and objectives, and then to make decisions about how to reach them. Because everything is

connected, a good strategic plan ensures that the pathways are figured out to meet (and hopefully exceed) the goals for any aspect of the organization. DPL retained the services of Harrington Management International (HMI) to lead the DPL Board of Trustees, its new Library Director, and the Strategic Planning Committee through a comprehensive Strategic Planning Process, which took place over the course of several months and resulted in a solid strategic plan for the Library for the coming three years (2023-2026).

Unlike the prior five year planning process for the DPL, HMI recommended that the Library's leadership adopt a three year plan going forward to reflect contemporary strategic planning practices more typically now in place for libraries, educational institutions, and nonprofit organizations. Doing so will help to make DPL a more nimble and responsive organization and one that will be better positioned to successfully perform its mission in the years ahead.

THE OUTCOME

At the end of this Strategic Planning process, the leadership of the Dedham Public Library was able to create a comprehensive and vibrant three year plan with quantifiable and qualifiable benchmarks to guide its future activities. This report reflects the work of the DPL Strategic Planning Committee in working together to craft this guiding document.

THE PARTICIPANTS

Members of the Board of Trustees of the Dedham Public Library, and additional volunteers from the community, served as the members of the DPL Strategic Planning Committee and were joined by Library staff.

The following 22 individuals participated in the work of the DPL Strategic Planning Committee:

- Shirin Baradaran, Chair, DPL Board of Trustees, Member, Strategic Planning Committee
- Mary Louise (ML) Bell, Member, Strategic Planning Committee
- Cecilia Butler, Representative, Friends of the Library
- Marisa Campanella, Library Staff; Member, Strategic Planning Committee
- Vickie Castagnola, Member, Strategic Planning Committee
- Jeannette Evans, Representative, Friends of the Library
- Diane French, Member, Strategic Planning Committee
- Nathan Gauthier, Member, Strategic Planning Committee
- Julie Harvey, Library Staff; Member, Strategic Planning Committee

- Alice Johnson, Dedham High School Representative to the DPL Strategic Planning Committee
- Brian Keaney, Library Trustee; Member, Strategic Planning Committee
- Dearbhla McHenry, Member, Strategic Planning Committee
- Julie McKee, Member, Strategic Planning Committee
- Rachel Miller, Member, Strategic Planning Committee
- Amber Moroney, Library Director; Member, Strategic Planning Committee
- Jessica Porter, Dedham Planning Board Representative to the DPL Strategic Planning Committee
- Crystal Power, Library Trustee; Member, Strategic Planning Committee
- Annette Raphel, Clerk, DPL Board of Trustees; Member, Strategic Planning Committee
- Tierney Smink, Member, Strategic Planning Committee
- Peter Springer, Member, Strategic Planning Committee
- Dennis Teehan, Dedham Select Board Representative to the DPL Strategic Planning Committee
- Tom Turner, Vice-Chair, DPL Board of Trustees; Member, Strategic Planning Committee

As noted earlier, Wesley E. Harrington, CAE, President of HMI and consultant to the Dedham Public Library, facilitated the effort and guided the attendees through the strategic planning process.

A variety of stakeholders and cohorts were interviewed individually or as part of a group during the data-gathering process for this exercise. Included in the group of cohorts were: The DPL Board of Trustees; The DPL Staff; Leadership of The Friends of the Library; Town of Dedham Representatives; Dedham Community Organizations, and; Representatives from the Dedham Business Community.

THE PROCESS

During the strategic planning process, HMI:

- Created the process for strategic plan development and familiarized the Board of Trustees, DPL Strategic Planning Committee, and Library staff with the process.
- Conducted three Strategic Planning Sessions (both in-person and, simultaneously, via ZOOM video conference) with the DPL Strategic Planning Committee.
- Conducted one Strategic Planning Session with the Library staff via ZOOM.
- Reviewed and re-defined Mission, Vision, Value Statements.
- Assisted DPL in determining Core Values.

- Conducted a SWOT Analysis [Strengths, Weaknesses, Opportunities and Threats] with the Board of Trustees (See Appendix 2).
- Conducted several SOAR [Strengths, Opportunities, Aspirations and Results] analysis exercises with diverse external stakeholder groups of the Library (See Appendix 2).
- Established objectives, strategies, operational tactics and KPIs (See below section Strategic Goals and Objectives: 2023-2026 and Appendix 1).
- Determined performance measurements tools.
- Produced the strategic plan.
- Introduced the DPL Strategic Plan to the Board of Trustees and staff.
- Provided a plan for regular monitoring of the plan by the Library Director and the Board of Trustees.

SWOT ANALYSIS

HMI conducted a SWOT exercise with the Strategic Planning Committee in order to determine the perceived current operating environment for the Library. These results were compiled following Strategic Planning Session #2 on July 9, 2022. Responses were submitted electronically and reported on July 13, 2022 (See Appendix 2).

STAKEHOLDER AND COHORT INPUT

During the strategic planning process, HMI interviewed or surveyed, either individually or as a group, a number of key stakeholders and cohort groups for the Library. Included in these interview sessions were:

- The DPL Board of Trustees
- The DPL Strategic Planning Committee
- The DPL Staff
- The Friends of the Dedham Public Library
- Town Representatives
- Dedham Community Organizations
- The Dedham Business Community
- Randomly Selected Dedham Residents

The results and commentary from each of the various stakeholder and cohort input sessions is referenced in Appendix 2: Stakeholder and Cohort Input Results.

STRATEGIC PLANNING SESSION REPORTS

Following the completion of each of the three strategic planning sessions, a summary report was created and distributed to the Strategic Planning Committee (See Appendix 2: HMI Reports of June 22, July 13, and July 22, 2022).

DPL CORE STATEMENTS

MISSION STATEMENT

A mission statement is a brief description of an organization's fundamental purpose. It answers the questions, "why do we exist?", "what do we do?", and "who do we do it for?"

Prior to the current strategic planning process, the Mission Statement of the Dedham Public Library was: To provide free and equitable access to information while valuing and fostering learning and creative human potential in a safe, fun, and collaborative environment. We empower and inspire discovery, inquiry, growth, and the application of knowledge in a community of kindness locally and beyond.

The revised Mission Statement of the Dedham Public Library is:

The Dedham Public Library: Facilitating lifelong learning and cultivating strong connections throughout our community and beyond.

VISION STATEMENT

A vision statement is an aspirational description of what an organization would like to achieve or accomplish in the mid-term or long-term future. It answers the question, "where are we going?"

Prior to the current strategic planning process, the Vision Statement of the Dedham Public Library was: To become a global leader at connecting people to opportunity, experiential and lifelong learning, literacy support, technology, and knowledge while offering sanctuary and resources to address community disparities and helping those in need.

The revised Vision Statement of the Dedham Public Library is:

As the heart of the community, the Dedham Public Library fosters an inclusive and inviting environment, supports lifelong reading, learning, and cultural enhancement, and provides innovative programs and services to meet the needs of the Dedham community.

VALUES STATEMENT

A values statement is a declaration that informs the members and staff of an organization about the entity's top ethical priorities and what its core beliefs are. It answers the question, "what do we stand for?"

Prior to the current strategic planning process, the Values Statement of the Dedham Public Library was: Leadership, Kindness, Innovation, Community Engagement, Daring, Equity, Excellence, Freedom, Privacy, Global, Diversity, High Standards, Conviviality, Safe Environment, Collaboration, Compassion and Understanding, Fun.

The revised Value Statement of the Dedham Public Library is:

The Dedham Public Library Values:

Inclusion and Access

We provide information, programs, and services that are open to all.

Intellectual Freedom

We uphold the right to privacy and the right to seek, access, and express diverse points of view.

Lifelong Learning

We encourage reading, literacy, creativity, and curiosity.

Innovation

We encourage organizational and staff innovation that adapts to emerging needs.

Respect and Integrity

We treat our community, staff, and partners with respect and dignity in a transparent and accountable manner.

Excellence

We hold ourselves to the highest standards in everything we do.

STRATEGIC GOALS AND OBJECTIVES: FY 23-26

The DPL Strategic Planning Committee developed five goals for the FY 23-26 planning period:

Goal 1: To undertake action to address the deficiencies in the physical infrastructure of the Library that impede DPL's ability to meet our mission and vision.

Our objectives are:

1. Continue to update existing buildings.
2. Form a Building Committee.
3. Conduct a needs survey/study.
4. Conduct a complete property survey of both Library buildings.

What will success look like in three years?

DPL will have committed to a plan to revitalize the Library for the benefit of its patrons, users, staff and community partners. While the actual renovations may not be complete, a comprehensive plan for the buildings will be in place and work will have begun to create a vibrant campaign to support this effort. The grounds of the Main Library and the Endicott Branch will have undergone significant improvements that will result in more visually appealing and inviting spaces in Dedham with improved accessibility.

Goal 2: To establish and implement a comprehensive marketing and communication plan for the Library to increase visibility and usage.

Our objectives are:

1. Create marketing and communications plans.
2. Expand the Library's newsletter offerings for different age groups and interests.
3. Evaluate the Library's website.

What will success look like in three years?

DPL will have established an identifiable visual image and a distinctive reputation within the community and be known for its engaged and transformative work on behalf of a diverse user-base and cohort group. DPL will be recognized as a vibrant, forward-thinking, community-centric hub for Dedham.

Goal 3: To partner with key organizations in the Town of Dedham to leverage complementary strengths and resources creating greater community impact.

Our objectives are:

1. Create a target list of current and potential partnerships.
2. Establish engagement plans for partnerships.
3. Implement an engagement plan.

What will success look like in three years?

DPL will have established a deep connection and formal relationships with a broad and diverse variety of community partners, which will result in more library resources being accessed by our patrons and users. We will have created vibrant partnerships with the Town of Dedham, area businesses, schools, and nonprofit and healthcare organizations.

Goal 4: To create a comprehensive funding program to support major library initiatives.

Our objectives are:

1. Determine the future funding needs of the Library.
2. Establish a potential funding mechanisms matrix for the Library (both current and prospective).
3. Determine fundraising guidelines.
4. Create a fundraising plan.
5. Establish a Library Foundation.

What will success look like in three years?

DPL will have enhanced its financial flexibility by creating a sustained and comprehensive fundraising effort for the institution, which will result in both an increase in financial reserves and a diversity of income streams. This enhanced financial flexibility will support the Library's mission, vision, and goals for the betterment of the community it serves.

Goal 5: To enhance and implement ongoing professional training and development programs for Trustees and Staff to maintain a culture of learning and continuous improvement.

Our objectives are:

1. Review and revise the Staff Manual.
2. Prepare procedures for new and existing administrative topics.
3. Develop a new Staff Onboarding Packet.
4. Establish a staff performance evaluation system.
5. Establish a plan for staff training and development.

6. Evaluate staff training.
7. Review / revise the Board of Trustees Governance Manual.
8. Review the Annual Board of Trustees Performance Evaluation process.
9. Establish topics and schedule for regular Board of Trustees training.

What will success look like in three years?

The DPL staff will be highly professional and fully engaged in their responsibilities while working in an environment that is conducive to growth, education, purpose, and job satisfaction. Likewise, DPL will have a high functioning, well-trained Board of Trustees with a diverse set of skills and work experiences, whose background is reflective of the community it represents.

Appendix 1: Goals, Objectives, and Key Performance Indicators

Following the establishment of each of the five major goals identified by the DPL Strategic Planning Committee, a set of objectives and key performance indicators (KPIs) were created for each individual initiative by the Library Director in consultation with HMI. The development of these project guideposts was essential to ensure the effectiveness and success of the overall strategic plan.

The five strategic planning goals created by the DPL Planning Committee, including the objectives and KPIs, are:

GOAL 1: UNDERTAKE ACTION TO ADDRESS THE DEFICIENCIES IN THE PHYSICAL INFRASTRUCTURE OF THE LIBRARY THAT IMPEDE DPL’S ABILITY TO MEET OUR MISSION AND VISION.	
OBJECTIVE	ACTION PLAN / KPIs
1. Continue to update existing buildings	<p>1.1 Have a walkthrough of both buildings to compile known building issues/projects by November 25, 2022.</p> <ul style="list-style-type: none"> • Facilities Director, Library Director, Board of Library Trustee representative <p>1.2 Repair the Endicott Branch Library’s circulation desk by November 2022.</p> <ul style="list-style-type: none"> • Facility staff have looked at the desk to determine the scope of work. • The Library Director will present the project to the Board of Library Trustees in September 2022. <p>1.3 Receive quotes for ramp repair at Main Library (<i>in time to submit FY24 capital requests, end of November 2022</i>)</p> <ul style="list-style-type: none"> • Facilities Department Project Manager will be the liaison between the designer/architect and the Board of Library Trustees and Library Director. <p>1.4 Receive quotes for window repairs at Main (<i>in time to submit FY24 capital request, end of November 2022</i>)</p>

	<ul style="list-style-type: none"> ● Facilities Department Project Manager will be the liaison between the designer/architect and the Board of Library Trustees and Library Director. <p>1.5 Front of Main Library redesign capital project (FY23) completed by end of June 2023.</p> <ul style="list-style-type: none"> ● Facilities Department Project Manager is the liaison between the designer/architect and the Board of Library Trustees and Library Director. <p>1.6 Evaluate the current layout of the Main Library</p> <ul style="list-style-type: none"> ● Beginning in October 2022 Library staff will begin relabeling and shift/move the adult collection, bringing some material to the main level to make it more accessible. To be completed by the end of January 2023. ● The Technology Librarian will investigate wiring needs of patron computers completed by September 30, 2022. ● The Library Director, Program and Outreach Manager, and Library staff will review the current layout of the Main Library to develop a plan to maximize space, beginning October 3, 2022; plan completed by November 4, 2022. ● Facility staff will work with the Library Director to move necessary furniture, beginning November 7, 2022; completed November 22, 2022. <p>1.7 Add signage in all existing spaces (<i>Main Library and Endicott Branch</i>).</p> <ul style="list-style-type: none"> ● In February 2023, following the completion of shifting/moving the adult collection, Library staff will work with the Director to compile a list of necessary signs. ● By March 2023, signage will be ordered and added to Library space. <p>1.8 Replace door to “study room” downstairs at the Main Library with a door that has a window (<i>allows for people to see in but still give quiet space</i>) by the end of June 2023.</p> <ul style="list-style-type: none"> ● Facility staff <p>1.9 Replace carpet in the Children's Room at the Main Library by June 2024.</p>
<p>2. Form a building committee</p>	<p>2.1 At the October 6, 2022 Board of Library Trustees meeting the Board will set guidelines for the formation of a Building Committee [Recommended completion date of December 1, 2022].</p>

	<ul style="list-style-type: none"> ● The composition of the Building Committee will be determined by the Board of Library Trustees, but it is suggested that it consist of two (2) Trustees, the Library Director, and a member from the Dedham Planning Board with experience in building rehab, architecture, historic buildings, etc. ● The Building Committee will be responsible for: <ul style="list-style-type: none"> ○ Investigating MBLC Building Grant requirements; make recommendation to the Board of Library Trustees regarding applying for MBLC Building Grant. ○ Compiling proposed Town building projects from the last ten (10) years reviewing best practice. ○ Visiting/contacting other Massachusetts libraries that have undergone a building project within the last year, focusing on cities/towns that have multiple branches and historic buildings. ○ Determining property restrictions (Historic District and Endicott Commission) <p>2.2 Beginning January 2023 the Building Committee will begin researching MBLC Building Grant requirements. They will make a recommendation to the Board of Library Trustees by April 2023.</p>
<p>3. Conduct a needs survey/study</p>	<p>3.1 The Building Committee will work with the Procurement Director to develop an RFP for a needs survey/study to help identify the community’s need for library service and determine the condition of the library facilities. The RFP will be posted by July 2023.</p> <p>3.2 The needs survey will be completed by December 2023</p>
<p>4. Conduct a complete property survey of both Library buildings</p>	<p>4.1 The Board of Library Trustees will work with the Town to have a complete survey of the properties done, beginning July 2023.</p>

GOAL 2: ESTABLISH AND IMPLEMENT A COMPREHENSIVE MARKETING AND COMMUNICATION PLAN FOR THE LIBRARY TO INCREASE VISIBILITY AND USAGE.

OBJECTIVE	ACTION PLAN / KPIs
<p>1. Create Marketing and Communications Plans</p>	<p>1.1 By September 16, 2022, the Program and Outreach Manager will form a marketing committee</p> <ul style="list-style-type: none"> • The committee will consist of five (5) Library staff members that are responsible for programs and marking library resources. <p>1.2 By September 30, 2022, the Library Director or Program and Outreach Manager will reach out to the Dedham Times and get a quote for weekly submissions.</p> <p>1.3 By December 2, 2022, the marketing committee will have developed a style guide for all library publications, flyers, and promotions.</p> <p>1.4 Beginning November 2022, the Library Director will assign library staff to prepare weekly submissions for the local newspapers (Dedham Times, Dedham Transcript, Dedham Patch); submissions will be reviewed by the Program and Outreach Manager.</p> <ul style="list-style-type: none"> • Submissions will follow a pattern, the first week of the month will include themed resources (all genealogy databases, etc.), the second week will highlight an upcoming one-off/special program, etc. • Submissions should be made a month at a time. <p>1.5 In November 2022, the Program and Outreach Manager and the Marketing and Program Specialist will develop a Social Media Plan; the plan should be completed by the end of November 2022.</p>

	<ul style="list-style-type: none"> • The Social Media Plan will include a general schedule of regular posts for programs, services, and resources and criteria for what gets posted and when/how often. <p>1.6 By December 19, 2022, the Program and Outreach Manager, with the help of programming staff, will release a 3-month program brochure/calendar; this will continue quarterly.</p> <p>1.7 By December 2022, the Town’s Director of Communications and the Program and Outreach Manager will determine what Library’s programs/services the Town will promote on their page(s).</p> <p>1.8 By January 6, 2023, the Library Director and Program and Outreach Manager will pull statistics for the first half of FY23 and compare them with statistics from the first half of 2022.</p> <p>1.9 In July 2023, the Library Director and Program and Outreach Manager will review program statistics and library utilization numbers to determine if changes need to be made.</p> <ul style="list-style-type: none"> • At this point, if utilization numbers have not increased the library should consider hiring a marketing consultant.
<p>2. Expand the Library’s newsletter offerings for different age groups and interests</p>	<p>2.1 In September 2022 the Library Director and Reading Advocate will research newsletter platforms that will allow for expanded newsletters (themed, age specific, etc.).</p> <p>2.2 By November 21, 2022, in time for the December newsletter, the Library will have transitioned to a new newsletter platform.</p>

	2.3 In June 2023, the Library Director and Program and Outreach Manager will review newsletter statistics, program statistics and library utilization numbers to determine if changes need to be made.
3. Evaluate the Library's website	<p>3.1 In January 2023 the Library Director and Program and Outreach Manager, with other library staff, will research other library websites and record features that may be added to our website.</p> <p>3.2 In February 2023 the Library Director and Technology Librarian, with the help of the Town's IT department if needed, will add features to the Library's website.</p>

GOAL 3: PARTNER WITH KEY ORGANIZATIONS IN THE TOWN OF DEDHAM TO LEVERAGE COMPLEMENTARY STRENGTHS AND RESOURCES CREATING GREATER COMMUNITY IMPACT.

OBJECTIVE	ACTION PLAN / KPIs
1. Create Target List of Current and Potential Partnerships	<p>1.1 Create a list of all organizations as potential partners for the Library and outline potential projects, services, and connections within each possible collaboration, beginning September 2022; initial list should be completed by October 28, 2022.</p> <ul style="list-style-type: none"> • The Library will create a spreadsheet for staff and trustees to input names/organizations with accompanying prioritization of contact.
2. Establish Engagement Plan for Partnerships	<p>2.1 Beginning October 31, 2022, the Library Director, Programming and Outreach Manager, and other Library Staff will build an Engagement Plan to work collaboratively with community partners. The Engagement Plan will be completed by February 24, 2023 and will include:</p> <ul style="list-style-type: none"> • Key contact information • What DPL can offer partner • What partner can offer DPL

	<ul style="list-style-type: none"> • How, when and how often contact should be made • Desired outcome with each partner • How will DPL know if a collaboration is successful
3. Implement Engagement Plan	<p>3.1 The Programming and Outreach Manager, with other Library staff, will begin rolling out the Engagement Plan in November 2022.</p> <ul style="list-style-type: none"> • The plan does not need to be completed in order for parts of the plan to be implemented. • Due to the nature of the plan and the different organizations that will be included, some partnerships will take longer to develop. <p>3.2 Outcomes from the Engagement Plan will be monitored for effectiveness.</p> <ul style="list-style-type: none"> • The Library Director and the Programming and Outreach Manager will review statistics and modify the plan on a rolling basis.

GOAL 4: CREATE A COMPREHENSIVE FUNDING PROGRAM TO SUPPORT MAJOR LIBRARY INITIATIVES.

OBJECTIVE	ACTION PLAN / KPIs
1. Determine funding needs of the Library	<p>1.1 At the December 1, 2022, Board of Library Trustees Meeting, the Library Director and the Board of Library Trustees will begin to develop a list of possible library initiatives for the next 5-years that may require extra-ordinary funding [To be completed by January 27, 2023]</p> <ul style="list-style-type: none"> • The list will include a general timeline • Estimated cost • Department/staff responsible • Reason • Rank of importance

	1.2 The Library Director and the Board of Library Trustees will review the list on an annual basis.
2. Establish potential Funding Mechanisms Matrix for the Library (both current and prospective)	2.1 Create a list of funding resources including balances/allocations if applicable [by January 27, 2023]: <ul style="list-style-type: none"> ● Town of Dedham ● Trust Funds ● Grants ● Donations ● Corporate Sponsorships ● Dedham Library Innovation Team ● Friends of the Library ● Special Events ● Signature Annual Fundraising Event
3. Determine Fundraising Guidelines	3.1 By October 7, 2022, the Library Director will have determined the extent and types of fundraising that is allowed.
4. Create a Fundraising Plan (Scope of Fundraising Plan is dependent on the outcome of Objective 3)	4.1 Establish 3-year target goals for fundraising and potential use of funds raised [by the March 2023 Board of Library Trustees meeting]. 4.2 The Library Director and representatives from the Board of Library Trustees will construct a comprehensive Fundraising Plan to address the funding needs of the Library <ul style="list-style-type: none"> ● BLT reps will be established at the May 4, 2023 meeting. ● Plan should be completed by the November 2023 BLT meeting. 4.3 Create a Case Statement in Support of the Creation of a formal fundraising initiative for the Library by December, 2023.

<p>5. Establish a Library Foundation</p>	<p>5.1 At the November 2023 Board of Library Trustees meeting, the Board will set guidelines for the formation of a Foundation Steering Committee [Recommended formation date being the December 2023 Board of Library Trustees meeting].</p> <ul style="list-style-type: none"> ● The composition of the Foundation Steering Committee will be determined by the Board of Library Trustees, but it is suggested that it consist of two (2) Trustees, the Library Director, and community members with experience in public foundations. ● The Foundation Steering Committee will be responsible for: <ul style="list-style-type: none"> ○ Investigating the purpose of the Foundation. ○ Determining if a Foundation should be formed. ○ Presenting the Board of Library Trustees with a recommendation on the establishment of a Foundation. <p>5.2 The Foundation Steering Committee will present their recommendation at the April 2024 Board of Library Trustee meeting</p> <ul style="list-style-type: none"> ● Investigate the possibility of the Friends of the Library transitioning to a Library Foundation
---	--

<p>GOAL 5: ENHANCE AND IMPLEMENT ONGOING PROFESSIONAL TRAINING AND DEVELOPMENT PROGRAMS FOR TRUSTEES AND STAFF TO MAINTAIN A CULTURE OF LEARNING AND CONTINUOUS IMPROVEMENT.</p>	
<p>OBJECTIVE</p>	<p>ACTION PLAN / KPIs</p>
<p>1. Review/Revise the Staff Manual</p>	<p>1.1 The Library Director will work with Library staff to update and expand the Staff Manual to include program plan and other operational procedures. Table of contents will be compiled by November 25, 2022; content updates and additions will be completed by June 30, 2023.</p> <ul style="list-style-type: none"> ● A physical copy will be at each circulation desk; digital copy will be available on Google Drive.

	<p>1.2 The staff manual will be reviewed on a yearly basis or as procedures change.</p>
<p>2. Prepare procedures for new and existing administrative topics</p>	<p>2.1 The Assistant Library Director, in consultation with the Library Director, will prepare an Administrative Manual. Table of contents will be compiled by November 25, 2022; content updates and additions will be completed by June 30, 2023.</p> <ul style="list-style-type: none"> ● PTO requests/calling out ● Payroll schedule (when to submit) ● Bill schedule (when to submit) ● Vendor ordering information <p>2.2 The administrative manual will be updated annually or as procedures change.</p>
<p>3. Develop a New Staff Onboarding Packet</p>	<p>3.1 Assistant Library Director will work with Library and Human Resources staff to develop a staff onboarding packet. The checklist will be completed by December 30, 2022.</p> <ul style="list-style-type: none"> ● The onboarding packet will include a checklist with pre-hire tasks: <ul style="list-style-type: none"> ○ Personnel Action Form ○ Set-up building keycard ○ Reach out to the Minuteman Library Network to create a new email account. ● Also included in the onboarding packing: <ul style="list-style-type: none"> ○ Links to Munis/ESS ○ Staff schedule ○ Circulation Manual ○ PTO procedures (who to call, how to request, etc.) <p>3.2 Onboarding packet will be completed by June 30, 2023 but will continue to be reviewed on a yearly basis or as procedures change.</p>

<p>4. Establish a staff performance evaluation system</p>	<p>4.1 Beginning September 2022, the Library Director will conduct one-on-one meetings with staff</p> <ul style="list-style-type: none"> • Bi-weekly meetings will be held with the Program and Outreach Manager and Assistant Library Director. • Quarterly meetings will be held with non-management staff. <p>4.2 The Library Director will work with Human Resources and the Union to develop a staff performance evaluation system by the end of June 2023.</p>
<p>5. Establish Plan for Staff Training and Development</p>	<p>5.1 By October 21, 2022, the Library will purchase an institutional membership from ALA.</p> <p>5.2 Beginning October 2022 staff will begin attending regular Minuteman Library Network, Massachusetts Library Systems, and ALA meetings/trainings that are related to their department and professional interests, relate to the needs of the Library, or as designated by the Library Director.</p> <p>5.3 The Director will create a yearly staff meeting schedule for Library staff by January 20, 2023.</p> <p>5.4 The Library Director, with Library staff, will develop a training program for new staff members by September 2023.</p>
<p>6. Evaluate Staff Training</p>	<p>6.1 The Director, in consultation with the HR Director, will conduct an annual review of the effectiveness of the staff training and establish training goals for the next year.</p>
<p>7. Review / Revise a Board of Trustee Governance Manual</p>	<p>7.1 The Board of Trustees in consultation with the Library Director will create a Governance Manual [by March 2, 2023]</p> <ul style="list-style-type: none"> • Copy of Town Charter and By-Laws that apply to the Board of Library Trustees • Board’s bylaws and schedule of board meetings

	<ul style="list-style-type: none"> ● Links to past Board minutes and agendas ● Current library budget, recent annual report and monthly reports ● Copies of Open Meeting Law and Conflict of Interest (Ethics) Law ● Contact sheet for board members and director ● Library’s mission, goals and strategic plan ● Library’s policies and procedures ● List of staff names and positions ● Information about Friends of the Library and DLIT ● What is your role/relationship to the library as an organization? ● What is your role as an elected or appointed official in your town or city? ● What state laws and community policies affect the library? <p>7.2 The Board of Library Trustees will review and revise, as necessary, the Board Governance Manual on a yearly basis or as policies change</p>
<p>8. Review the Annual Board of Trustees Performance Evaluation Process</p>	<p>8.1 Board of Trustees will establish a process for the annual self-evaluation by the January 5, 2023 meeting.</p>
<p>9. Establish Topics and Schedule for Regular Board of Trustees Training</p>	<p>9.1 The Board of Library Trustees, in consultation with the Library Director, will establish a schedule of annual library management and library training topics for the Board of Trustees [by March 2, 2023]</p>

Appendix 2: HMI Reports

Harrington Management International (HMI) prepared and distributed the following reports throughout the course of the DPL Strategic Planning Project to summarize important activity and actions. Copies of these reports are available upon request from the Library Director.

- [Stakeholder and Cohort Input Results](#)
 - HMI Report of June 9, 2022 / Amended, September 1, 2022
- [DPL S.W.O.T. Results Report](#)
 - HMI Report of July 13, 2022
- [Planning Session # 1, June 18, 2022](#)
 - HMI Report of June 22, 2022
- [Planning Session #2, July 9, 2022](#)
 - HMI Report of July 13, 2022
- [Planning Session #3, July 16, 2022](#)
 - HMI Report of July 22, 2022

Appendix 3: The Value Of Planning

The value of the creation and implementation of a well-conceived strategic plan for an organization is immense and transformative. The benefit of having a comprehensive plan specifically crafted for the Dedham Public Library will:

- Bring clarity and agreement on the mission, vision, and values of the Library. Defining a shared vision for the future direction for an organization and then planning based on that desired outcome is the essence of strategic planning.
- Help DPL prepare for the future. Strategic planning facilitates making short-term decisions based on long-term implications. It is a dynamic action that lends flexibility to the organization so that when change occurs, a plan is in place that can be adapted to accommodate the changes.
- Help DPL anticipate and manage change. planning allows an organization to anticipate change and prepare for it. In fact, by anticipating and planning for dramatic change, instead of just reacting to it, an organization can determine how to deal with the change.
- Improve DPL's decision-making processes. with a strategic plan in place, day-to-day decision making and problem solving will be directly related to long-range and short-term goals. strategic decision making and problem solving assure that the organization's vision will be achieved.
- Promote effective stewardship of the Library. Practicing good stewardship means being accountable to others. Because strategic planning helps organizations fulfill their missions, it also helps them be stewards of the public's trust.
- Align the DPL board and staff. when there is shared purpose and direction, there is the basis of a high-performance team. an organization's mission cannot be achieved without board members and staff who agree on a common direction and are committed to achieving success for the organization.
- Provide an opportunity for DPL's board and staff to recommit to the cause. Focusing on the future work of the organization can bring the board, staff, and other stakeholders into alignment around the mission — group interaction around a cause often fuels individual commitment.
- Educate DPL's leaders about institutional history. by understanding your organization's past, you can make choices about what you want it to become in the future. This document can also be valuable in orientation of new staff, volunteers, and board members.
- Identify existing strengths in DPL. constituent feedback conducted in conjunction with the plan indicates how well the organization is meeting expectations. It can also show you where your efforts are paying off and what to celebrate.
- Provide DPL with an opportunity to analyze the Library's systems and processes. it is valuable to conduct a critical review of the organization's processes and how

it operates. A review provides an opportunity to analyze different systems and processes and make changes to improve them.

- Reinforce the need to commit to continuous improvement for the Library. planning allows an organization to anticipate and prepare for change. an organization without an effective strategic plan may react in a hurried, scattered way to unanticipated circumstances.

Looking ahead and planning for the future should be continuous. As various factors change, the Dedham Public Library may need to adjust its plans. While the process of bringing everyone together to plan for the future is energizing, once the process is completed, the plan should not gather dust on the shelf. The Library's leadership and Library Director must revisit the plan periodically, make adjustments as necessary, and adapt the plan accordingly as DPL's strategic priorities and circumstances change.

Appendix 4: Monitoring, Evaluating, And Communicating The Plan

Questions to ask while monitoring and evaluating the plan

Monitoring and evaluating the planning activities and status of implementation of the plan is -- for many organizations -- as important as identifying strategic issues and goals. One advantage of monitoring and evaluation is to ensure that the organization is following the direction established during strategic planning. Strict monitoring of your strategic plan allows you to learn a great deal about your organization and how to manage it more effectively

Are goals and objectives being achieved or not? If they are, then acknowledge, reward and communicate the progress. If not, then consider the following questions to ask while monitoring and evaluating the status of the implementation of the plan:

1. Will the goals be achieved according to the timelines specified in the plan? If not, then why?
2. Should the deadlines for completion be changed (be careful about making these changes -- know why efforts are behind schedule before times are changed)?
3. Do personnel have adequate resources (money, equipment, facilities, training, etc.) to achieve the goals?
4. Are the goals and objectives still realistic?
5. Should priorities be changed to put more focus on achieving the goals?
6. Should the goals be changed (be careful about making these changes -- know why efforts are not achieving the goals before changing the goals)?
7. What can be learned from our monitoring and evaluation in order to improve future planning activities and also to improve future monitoring and evaluation efforts?

Frequency

The frequency of plan progress reviews depends on the nature of the organization and the environment in which its operating. HMI recommends that the Library Director monitors the strategic plan on a monthly basis and reports any significant accomplishments, changes, or need for alteration at the monthly meeting of the Board of Trustees. Further, HMI strongly recommends that the DPL Trustees monitor the progress of the plan on a quarterly basis as part of its monthly Board meeting at that time.

Reporting

Reporting on the progress of a strategic plan is a vitally important component in terms of the long-term success of the effort. Regular status reports are the benchmark for success in strategic planning. Become conditioned to doing the following:

- Always write down the status reports. In the reports, describe:
 - Answers to the above key questions while monitoring implementation.
 - Trends regarding the progress (or lack thereof) toward goals, including which goals and objectives.
 - Recommendations about the status, and/or any proposed changes.
 - Any actions needed by management.

Deviating from, and changing, the plan

This plan is not static but rather an extremely dynamic document and should be viewed, and reviewed, accordingly.

Deviating from the plan

It's acceptable to deviate from the strategic plan: The plan is only a guideline, not a strict roadmap which must be followed. But planners should understand the reason for the deviations and update the plan to reflect the new direction.

An organization may end up changing its direction somewhat as it proceeds through the coming years. Changes in the plan usually result from changes in the organization's external environment and/or the organization's needs result in different organizational goals, changes in the availability of resources to carry out the original plan, etc.

The most important aspect of deviating from the plan is knowing why you're deviating from the plan, i.e., having a solid understanding of what's going on and why.

Changing the plan

Be sure some mechanism is identified for changing the plan, if necessary. For example, regarding changes, write down:

- What is causing changes to be made
- Why the changes should be made (the "why" is often different than "what is causing" the changes).
- The changes to be made, including the goals, objectives, responsibilities and timelines.

Manage the various versions of the plan (including by putting a new date on each new version of the plan). Always keep old copies of the plan!

Discuss and write down what can be learned from recent planning activity to make the next strategic planning activity more efficient.

A note about celebration

HMI has been involved with many strategic planning activities during our decades in business. Rarely, when a plan is completed, do organizations really acknowledge the success they have achieved. Instead, planners are often so focused on "progress" and problem solving, that they're too eager to move on to the next version of the plan.

Celebration is as important as accomplishing objectives -- maybe more. Without a sense of closure, acknowledgement and fulfillment from a job well done, the next planning cycle becomes a grind. Celebrate your achievements and success: You deserve it!

Communicating the plan

When the DPL Strategic Plan is completed and approved by the Board of Trustees, the plan needs to be revealed and explained to Library staff and key cohorts.

Communicating the plan to employees

It is imperative that every person involved in the Library's team (Trustee and staff) is fully knowledgeable about all aspects of the strategic plan. It is critically important that each individual can envision where they belong in the process and what their respective responsibilities are to make this vision a reality.

Once the plan has been approved by the Board of Trustees, it should be presented to the Library staff by both the Chair of the Board and the Library Director. In order to do this, you must:

1. Establish a time and date for the express purpose of meeting with the staff to review the plan with them in great detail.
2. Prior to the Plan Roll-out Meeting with the staff, distribute copies of the Strategic Plan to each staff member and request that they read it in advance of the meeting.
3. During the meeting, explain the significance of the goals and objectives of the report and stress their involvement in the work of the plan.
4. Review the KPIs ("Key Performance Indicators") of the plan and make certain that the staff understands its role in the achievement of the plan.
5. Commit to holding quarterly Strategic Plan progress updates as part of regularly scheduled staff meetings.
6. Relate staff recommendations for improvements or potential conflicts as soon as possible to the Board of Trustees so that these items can be addressed in the strategic plan.

Communicating the plan to external stakeholders and cohorts

Just as it is imperative that every person involved in the Library's team is fully knowledgeable on all aspects of the Strategic Plan, so, too, is it necessary to keep the Library's stakeholders informed about the efforts to improve the Library and its user experience. To do this, you must:

1. Establish a time and date for the express purpose of meeting with the Library's stakeholders to discuss the plan with them in broad detail, especially stressing those aspects of the plan that relate to community engagement.
2. Prior to the Plan Roll-out Meeting with the stakeholders distribute copies of the Strategic Plan, modified to focus on those matters which directly affect the stakeholders such as community engagement activities, building renovations, services to be offered, etc.
3. During the meeting, explain the significance of the goals and objectives of the report and stress the effort made to incorporate the needs of the community in this work.
4. Review the overall goals of the plan and the relevant objectives in each instance.
5. Commit to electronic progress updates (through the newsletter feature of the communications plan of the Library) to the stakeholders to keep them informed as to the progress of the Library's efforts.