PUBLIC LIBRARY   WAUKESHA, WIS.   J-268

WAUKESHA PUBLIC LIBRARY

2014 STRATEGIC PLAN

INTRODUCTION

The planning process for the Waukesha Public Library 2014 Strategic Plan began in late 2013, and concluded in Spring 2014. Utilizing a SWOT (Strengths, Weaknesses, Opportunities and Threats) survey similar to the metric used during the 2012 planning process, the study included input from five separate stakeholder groups: the *Waukesha Public Library Board of Trustees*, the *Library's Administrative Team*, *Library Staff*, the *Friends of Waukesha Public Library*, and the *General Public* by way of the Library's digital newsletter distribution list.

Data was collected by using a digital survey through *SurveyMonkey.com* and was deployed between February 4 and February 27, 2014. Out of the initial sample of at least 941 survey participants, 258 responded, or 27.4% of the set. 60 samples were immediately discarded due to non-participation beyond a general identification; other than a few accounts that were created to test the survey before publication, it is not known why these particular samples were abandoned. Incomplete answers, however, were incorporated into the analysis, ultimately arriving at 198 valuable responses or 21.0% of the 941 respondents.

The sample is approximate due to overlap of stakeholder groups in the *General Public* and the *Friends of Waukesha Public Library* sample. It is highly unlikely that individuals who belonged to more than one group took the survey multiple times to account for their varied participation, so the overall sample was in the range of 941-1,235 individuals. The most conservative estimate (in this case, 941 participants) was used in order to align the survey with best practices in data gathering, but it is statistically likely that the number was far higher. It should also be noted that the survey was only sent to those individuals who have email addresses, and a print copy was not distributed.

The initial sample resulted in 2,229 lines of useful qualitative data, which were then sorted into 17 categories using a relative frequency distribution in combination with manual placement. These categories were ultimately edited down to 10 basic classes which each include a general goal, two to five strategies (36 total), and measurable objectives that will be used to gauge progress and completion. The combination of these three elements (goals: the primary outcome; strategies: the approach to achieve the goal; and objectives: the applied measure to achieve the strategy) will ensure both success and accountability for our team throughout the tenure of the plan.

The 2014 Strategic Plan for the Waukesha Public Library begins with a vision, sets in place a mission, and concludes with measurable objectives that will gauge success in a variety of areas of service. It takes into account the needs of our local and regional community of users, the needs of our staff, and will propel the organization into the next era of outstanding service and recognized leadership throughout the state of Wisconsin.

CONTENTS

VALUES

VISION

The Waukesha Public Library is the community's best source for inspiration, ideas, and information.

MISSION

The Waukesha Public Library provides a welcoming and dynamic environment where citizens of all ages can find the inspiration, ideas, and information to reach their full potential.

PHILOSOPHY

We are committed to serving citizens of all ages in a customer-centered and proactive manner.

We will reflect current intellectual, cultural and artistic interests of our community.

We will introduce new technologies, services and collections to present opportunities to gain knowledge and inspire civic engagement.

We are dedicated to providing equal access to all — independent of age, education, ethnicity, language, income, physical limitation or geographic barriers.

BACKGROUND

GOVERNANCE

Wisconsin Statute § 43.54 (1) (a) stipulates a nine-member Board of Trustees of the Waukesha Public Library, eight of whom are appointed by the Mayor of Waukesha, with the ninth member appointed by the Office of the Superintendent of the Waukesha School District. Two additional members from True Non-Resident (TNR) communities in Waukesha County are appointed by the Chief Executive of Waukesha County.

The powers and duties of the Board of Trustees are prescribed in Wis. Stat. § 43.58 (1) et al, and include policy creation, administrative oversight and exclusive fiscal control of all expenditures. The City of Waukesha acts as the Waukesha Public Library's major tax-supported funding partner, accounting for $2,328,920 (61%) of the $3,810,660 FY2014 Operating Budget. Waukesha County also provides $1,137,199 (30%) of financial support, with the remaining 9% from revenue, gifts and other sources.

HISTORY

The Waukesha Public Library is a 71,566 square foot facility located in picturesque Cutler Park in the geographic center of the city of Waukesha, Wisconsin. Established in 1896, the Library was the 16th Andrew Carnegie-funded institution in Wisconsin in 1903; five additions and renovations followed, with the most recent three in 1988, 2005 and 2010. The latest renovations incorporated a Teen Zone and an Early Learning Center called *321 Alphabet Square*.

SPACE

The Library is currently addressing issues of insufficient parking, an under-sized Community Room, and inadequate public service space in the future. A Space Needs study was completed in 2013 by Milwaukee-based architectural firm Engberg Anderson, and it identifies four major areas to renovate: the original Carnegie Reading room, the Community Room, a way-finding solution that incorporates new signage, lighting and interior design elements, and a MakerSpace Media Lab. These four areas will be the primary focus of interior and exterior changes to the facility over the next 3-5 years.

COLLECTIONS

The Waukesha Public Library is committed to serving the intellectual, cultural and artistic needs of all citizens. In order to achieve this goal, it provides a balanced collection of over 400,000 items that includes print materials, e-media (including electronic books, DVDs, and CDs), a permanent collection of original art from local artists, and free, high-speed access to the Internet. In particular, the Library has developed digital collections that surpass the *enhanced* collection standard as required by the Wisconsin Department of Public Instruction (DPI). The number of total volumes of over 300,000 meets the *moderate* level for the service population size of over 93,000 citizens, and the materials budget is above the *enhanced* level. Interestingly, patron demand for e-media has risen 287% over the past two years, so the Library will continue to make this area a primary focus of short- and long-term operations.

PERSONNEL

The Library currently employs 44.025 FTEs, thirteen of whom hold a Master's Degree in Library Science, and far exceeds the Waukesha County Federated Library System (WCFLS) standards for municipal populations. It currently falls below the basic level of staffing when compared to desirable DPI standards for the service population, but both part-time and full-time positions will continue to be added to the employee base over the next 3-5 years. Volunteers donate an average of nearly 1,300 hours per year as a complement to permanent staff, or more than $10,000 of significant tax burden relief to citizens.

CIRCULATION

The Waukesha Public Library annually circulates over one million items to over 60,000 registered patrons, making it one of the most heavily used single site libraries in Wisconsin. Digital media accounted for 38% of total circulation, and children's material made up 39%. Additionally, the Library shares approximately 22% more material through inter-library loan than it receives, at just over 73,000 items sent to other libraries in Wisconsin.

SERVICES

The Library provides a range of services that include reference advisory, Library tours and instruction, and programming for all ages, including book discussions, cultural and artistic seminars and computer instruction. Program offerings increased to a record high of 809 in 2013, and attendance at these events was up over 40% from 2012. Additionally, the Library is a center for high-speed Internet access and business applications.

WAUKESHA READS

In 2007, the Waukesha Public Library applied for and received its first *Big Read* grant from the National Endowment for the Arts. Since that time, the Library has collaborated with over fifty community partners to present *Waukesha Reads*, an annual community-wide reading and literacy program. *Waukesha Reads* presents a unique opportunity for participants to read, discuss and celebrate a single book and author, while promoting reading for pleasure and enrichment. In 2013, the Library produced its largest and most far-reaching event to date, and also received the highest grant value since its inception.

AUTOMATION

The Waukesha Public Library is the founding member of *Catalog Access For Everyone* (CAFE), the integrated library system (ILS) shared by all sixteen public libraries in Waukesha County and now managed by WCLFS. In 2013, CAFE transitioned from the Sirsi/Dynix ILS to Polaris Library Systems and has introduced several new initiatives as a result of new software capabilities.

LIBRARY OF THE YEAR

The Library was honored to be named the *2011 Library of the Year* by the Wisconsin Library Association, with local and regional partnerships, proactive planning, award-winning architecture, the community-wide reading program, and public art collection cited as particular strengths.

CONCLUSIONS

DATA REVIEW

The following conclusions were readily apparent after a thorough review of the data:

I. The SWOT survey responses were detailed and constructive, and will be applied to a wide variety of uses that transcend this Strategic Plan. The strategies within this document relate only to short- and long-term direction of the Waukesha Public Library and highlight potential areas of growth; in this vein, the responses were used to create a broad sense of *where* the Library should be headed, and *how* we get there. The specific issues raised in most of the responses from the survey are better suited for job performance evaluation measures and will be utilized as such, in cooperation with the 2015 Classification and Compensation Study funded by the City of Waukesha.

II. Digital content delivery of media is inevitable. The Waukesha Public Library must stand ready to defend their leading role as the center of information classification and distribution in our community, and can do so by embracing this transition as a sign of progress, not decline. It will be by incorporating streaming technology into the collection development and distribution process that a new generation of library patrons will find similar value in the Library as have generations before them. Traditional media has already shown itself to be able to exist largely independent of digital content delivery and can certainly remain a core component of library services, so it will be a combination of old and new, so to speak, that will secure the Waukesha Public Library as a central foundation of the community for years to come.

III. Human-based interactive experience must be a focus for the Waukesha Public Library in the future. Media is becoming increasingly personalized, and while libraries can and should continue to play a central role in that, academic, cultural and artistic programs and events add new depth and dimension to what the Library can offer. It is an area that is not easily accessible in any other venue (particularly for free) and the Library has both the expertise and the complementary information readily at hand to adopt this vital role.

IV.   Similar to programming, the Library should adopt a far more engaged role in the educational process in our society. There are few free and credible opportunities that exist for people once they reach a certain age, and it becomes increasingly difficult for them to learn necessary skills for workplace literacy, cultural exposure and personal enrichment. Waukesha Public Library classes can reach a point where they are relied on to help people become more involved citizens, to enter the workforce with the appropriate skills needed to be successful, and so that they can continue to contribute to society in a variety of ways.

V.   The Waukesha Public Library should expand its extensive partnerships with other public libraries in Waukesha County, along with its network of local and regional partners, engagement in state legislative affairs, and interest in the national lobby for public libraries as these add continued benefit for the organization and by association, patron base.

VI.   The Library has gone to great lengths to create a circulation system founded in ease-of-use and efficiency, and this has had a paradoxical effect on the number of materials circulated. Analyzing this effect and ensuring an appropriate cardholder to total circulation ratio is imperative for continued state and county funding.

VII.   The Waukesha Public Library has an opportunity to host major traveling exhibits, cultural expositions and special collection displays from around the country. These sorts of events create a unique customer experience that add depth to regular operations while at the same time placing the Library in a tier common with major municipal institutions.

Several conclusions from the 2012 Strategic Plan are appropriate to include in this document, as they articulate ongoing strategies that are largely timeless as they apply to short- and long-term operations (listed verbatim):

VIII.   The Library will continue to explore opportunities for full and/or additional funding. These will include working with the City of Waukesha to ensure funding at a level that maintains current service programs and meets Waukesha County's standards for local libraries, as well as pursuing ideas for alternative sources of revenue.

IX.   The Library will maximize use of the current collection by making new and returned materials available in a timely manner, and will use multiple means to tailor the collection to the community.

X.   The Library will analyze the space necessary to provide library services to the community over the next twenty-year period. It will seek long-term solutions to the need for additional parking and meeting spaces.

STRATEGIES

CATEGORIES & CLASSIFICATION

The 2,229 lines of respondent data applied to an initial total of 17 categories listed below. Immediate edits to simplify the list eliminated *Not Applicable (N/A), Relevancy & Philosophy* and *Positive Feedback*. Additional edits included merging *Parking* with **Space Needs & Facility**, *Security & Safety* with **Internal Affairs & Human Resources**, and *Hours of Operation* with **Customer Services & Marketing**, ultimately creating 10 final categories for review. *Spanish Language Collection & Services* was merged with multiple categories instead of remaining isolated, as we consider service to this particular demographic a normal part of regular operations. Note that there was also natural carryover between categories, so that has been delineated where appropriate.

Categorizing every aspect of library services is inherently limiting, so certain elements that did not have categories of their own were placed accordingly, if only to ensure that all responses were considered: *Outreach* is included in **Customer Service & Marketing**; *Volunteerism* and *Friends of WPL* are in included in **Partnerships & Networking**; *Polaris* and other Catalog-specific items are included in **Technology**; the *art collection*, *recycling* and *collection navigation* are included in **Space Needs & Facility**; and *Overdrive* and *e-material* are included in **Collection Development**.

All data, irrespective of categorical classification or elimination, will be utilized in other areas, such as job performance evaluations and general to-do items that fall within the purview of regular operations.

1 Budget & Finance
2 Collection Circulation
3 Collection Development
4 Customer Service & Marketing
5 Hours of Operation
6 Internal Affairs & Human Resources
7 Not Applicable (N/A)
8 Parking
9 Partnerships & Networking

10 Positive Feedback
11 Programs & Events
12 Relevancy & Philosophy
13 Security & Safety
14 Space Needs & Facility
15 Spanish Language Collection & Services
16 Staff Development
17 Technology

BUDGET & FINANCE

Goal: Capitalize on as many available resources as possible to guarantee long-term financial support for the Waukesha Public Library, independent of municipal or county-related funding.

I.   Strategy: Provide evidence to the City of Waukesha that a +1.0% maintenance of effort for municipal funding must continue if current staffing levels, organizational objectives and long-term goals are to be met.

    A. Make at least two annual presentations to the City of Waukesha Common Council and/or Common Council Finance Committee to demonstrate a quantifiable ROI of at least 5.0% on all funding increases for any specific aspect of services, programs and/or collections as part of general operations.

II.   Strategy: Develop a network of corporate, academic and individual donors to increase revenue.

    A. Create an ongoing process of soliciting corporate donors for annual gifts, with emphasis on local businesses and grant programs. Have in place a protocol for such solicitations with at least one major contracted amount other than the National Endowment for the Arts (NEA) by Q4 2016.

    B. Establish 501(c)(3) Waukesha Public Library Foundation, complete with a Board of Directors, by Q4 2016.

III. Strategy: Evaluate Waukesha County Federated Library System (WCFLS) funding structure.

    A. Examine WCFLS-provided Resource Library funding to ensure that all monies appropriately reflect services provided to Waukesha County and not just the Waukesha Public Library, and utilize resultant political capital to offset and/or subsidize at least one new or current services provided by WCFLS by Q4 2014.

COLLECTION CIRCULATION

Goal: Create a more efficient and cost-effective system for circulating material to Waukesha Public Library patrons and other libraries in the state of Wisconsin.

I.   Strategy: Evaluate fines, fee and restitution structure to maximize potential revenue in balance with a high-quality customer experience.

   A. Work with the contracted collection service to increase recovery of patron-owed income from 51% to 55% by Q4 2015. Gauge success of recent financial policy changes by their effect on this objective; meet with collection service at least once-per-year to review increases, starting no later than Q1 2015.

   B. Among other avenues of fee evaluation, lower maximum fine threshold from $20.00 to $10.00 per patron by Q2 2015. Promote this change to minimize patron impact, and ensure a resultant minimum of a $10,000 return over two years.

   C. Investigate implications of adding additional fees to other services offered, including fines for abandoned holds and facility use. Finalize conclusions and put in place potential changes by Q4 2015.

II.   Strategy: Address failing infrastructure needs.

   A. Replace current drive-up book drop machinery by selecting and contracting a new product that meets all departmental needs through an RFP by the end of Q4 2014, with full installation (including staff training) completed by Q1 2015.

   B. Implement RFID technology for materials processing by Q4 2016.

III.   Strategy: Maintain a minimum 16.75:1 ratio of collection circulation to current City of Waukesha cardholders.

   A. Work with the Wisconsin Department of Public Instruction - Public Libraries Division and the System and Resource Library Administrator Association (SRLAAW) to ensure that all material independent of medium are included in a total circulation tally for the 2016 Public Library Annual Report to the State of Wisconsin.

   B. Partner with other WCFLS Libraries (APL) to develop special incentives to increase collection circulation. Have in place a plan by Q4 2015 that includes marketing and potential reward programs.

COLLECTION DEVELOPMENT

Goal: Enhance current collection by transitioning specific areas to digital delivery, while continuing to offer traditional media to an evolving demographic. Maintain focus on local community information needs.

I.   Strategy: Advance effort to complement traditional media with digital content delivery in line with national trends.

      A.   In accordance with Wisconsin Statute § 43.15 (4) (c) (4), partner with WCFLS and the 15 other public libraries in Waukesha County to provide at least one digital-based streaming service besides Overdrive Media to our regional community by Q4 2015.

II.   Strategy: As part of *Collection Circulation (III) (B)*, review the Collection Development Plan to encourage wide circulation of materials that reflect evolving local interest.

      A.   Continue to review circulation data to remove items that are not circulating in an effort to help (a) arrest the decline of total circulation and (b) ensure that the collection contains appealing and useful materials for all current and potential users of the Library. Complete a thorough evaluation of the collection by Q2 2015.

III.   Strategy: Exercise fiscal responsibility and increase customer satisfaction by maintaining condition of current collection, with emphasis on Audio/Visual materials.

      A.   Create and implement a plan to regularly and proactively clean and repair disc-based media by Q4 2014.

CUSTOMER SERVICE & MARKETING

Goal: Further develop current customer-centered approach by implementing measures to make it easier for patrons to interact with and be informed about Library offerings and services, and to provide a high-quality, safe and valuable experience for every individual who utilizes the Waukesha Public Library.

I.   **Strategy: Review hours of operation to maximize exposure to Library services.**

      A. Develop options for expanding hours of operation from a purely financial perspective so that it can be considered an ongoing operational cost. Design a plan that reflects the cost and personnel requirement of extended hours by Q3 2014 so that it may be included as a budget proposal for FY2015.

II.   **Strategy: Create professional-grade graphic designs to increase market share and standardize public relations message and content.**

      A. Standardize PR imagery and stylesheets, with emphasis on official documentation.

      B. Create media presentations for web and social media delivery.

      C. Create standardized press releases that are intended for specific media outlets and build a permanent marketing network of such.

      D. Continue to expand social media participation by Q4 2015.

      E. Create a cross-departmental Marketing Committee that includes marketing staff, administrators, managers and other personnel who have shown a particular interest in becoming more involved with PR imagery and graphic design. Have in place by Q4 2014.

III.   **Strategy: Continue to create a customer-centered approach by utilizing newsletter-based annual patron surveys that are geared to specific areas of operations.**

      A. Increase digital newsletter subscriber tally to at least 1,000 with a minimum of 90% retention over three years by Q4 2015.

      B. Utilize such surveys to manage objectives described in *Collection Development (II) (A) (a) & (b)*, in addition to other areas of operations.

      C. Improve communication with the local Hispanic community by increasing the number of promotional materials available in Spanish. Create Spanish versions of the Welcome Brochure, the Adult and Teen Summer Reading Program informational materials, and promotional pieces for any Spanish-language programming by Q4 2016.

INTERNAL AFFAIRS & HUMAN RESOURCES

Goal: Further develop organizational culture of employee empowerment, accountability and capability.

I.   Strategy: Implement job performance evaluations.

    A. The City of Waukesha is undergoing a Classification & Compensation study to be completed by Q4 2104. Upon completion, work with the City of Waukesha Human Resources department and the City Administrator to review job description expectations and compensation packages.

        1. Review options for pay-for-performance and other merit-based initiatives to develop an objective-based system for employee reviews. Pending Board of Trustee approval, have a plan in place by Q4 2015.

        2. Review options for pay-for-performance and other merit-based initiatives.

        3. Ensure that classifications for all staff are consistent with similar positions and classifications throughout the City of Waukesha employment base. Review inconsistencies and make adjustments by Q4 2015.

II.   Strategy: Improve internal communication.

    A. Host a quarterly all-staff meeting to share information, discuss strategy, hear committee reports, and to discuss other pressing business. The first meeting of this sort will take place no later than October 2014.

    B. Survey all staff at least once per year on specific items that relate to their work experience.

III.   Strategy: Continue to foster a safe, welcoming and favorable environment for Library patrons and staff alike.

    A. Establish a relationship with the Waukesha County District Attorney's office to make the most of restitution for material theft and property damage by Q4 2014, with at least one major award (if applicable) by Q4 2015.

    B. Improve public image of the Library by minimizing Waukesha Police Department involvement in incidents that are better handled in-house by contracted security agency. Maintain documented record of major rule violations and continue to share information about potential threats to all staff.

    C. Review security protocol and resultant action with contracted security agency on a biannual basis that may include policy and procedural elements, starting no later than Q4 2014.

PARTNERSHIPS & NETWORKING

Goal: Capitalize on recent momentum in opportunities for the Library to play a far larger role in state politics and pending legislation. Use local, state and national lobbyists to secure leading role in the future of public libraries.

I. Strategy: Be a statewide and national leader of public libraries by participating in the legislative process and furthering common interests for the betterment and long-term stability of the Library.

    A. Capitalize on WPL's position of Chair of SRLAAW to ensure leading voice in statewide public library matters, and use this position to support *Collection Circulation (III) (A)*, and broker other potential legislative efforts.

    B. Participate in the Wisconsin library legislative process, including Wisconsin Library Legislative Day (LLD), National LLD, the Wisconsin Library Association (WLA), the Wisconsin Association of Public Libraries (WAPL), and other similar organizations to lobby support for WPL interests.

II. Strategy: Improve already strong relationship with the Friends of Waukesha Public Library and assist in membership acquisition and retention.

    A. Increase Friends' membership to 500 and retain for at least one year at that level by Q4 2016.

    B. As part of *Customer Service & Marketing (II) (A)*, include a standardization of Friends' marketing material.

III. Strategy: Improve relationship with regional colleges and universities to adopt role as Teaching Library.

    A. Continue to support the field experience requirement of the University of Wisconsin-Madison and the University of Wisconsin-Milwaukee, and develop at least two opportunities for WPL staff to participate in real-world practicums as speakers by Q4 2016.

IV. Strategy: Continue to cultivate relationships with local business, organizations and educational institutions to increase Library reach and improve services to the community.

    A. Promote early literacy skill-building and associated Library resources to low-income families through continued partnerships with organizations with similar missions.

    B. Build on current relationships with the Waukesha School District, Daycare centers, the Waukesha Parks & Recreation Department, Waukesha Youth Collaborative and the Waukesha Hispanic Collaborative Network.

        1. Design a plan to help facilitate program registration at partner satellite sites, with emphasis on the 1000 Books Before Kindergarten (1KB4K) program by Q4 2014.

        2. Increase offerings of *Bright Beginnings* and *Books Too Good To Miss* workshops by 100% by Q4 2015.

        3. Partner with local presenters to add four new programs to the lineup by Q4 2015.

PROGRAMS & EVENTS

Goal: Become community epicenter of free academic and cultural events that support literacy, and teach classes that revolve around valuable life and work skills.

I. Strategy: Capitalize on overwhelming community interest in recent programs and special events by improving attendance and both quality and quantity of events offered.

    A. Increase Children's program offerings by 2.0% over 2013 programming levels, with at least 10 programs per year in Spanish by Q4 2016.

    B. Increase Adult program offerings by 10.0% over 2013 programming levels, with at least two programs per year in Spanish by Q4 2016.

II. Strategy: Continue teaching classes in a variety of disciplines.

    A. In accordance with Wisconsin Statute § 43.15 (4) (c) (4), partner with WCFLS and APL to launch at least one credible, autodidactic learning service by Q4 2015.

        1. Promote such service to the general public, local business, City and County employees, and the Waukesha County school system.

        2. Utilize such service as a fully-funded option for Library staff professional development.

III. Strategy: Continue to build public support and funding for Waukesha Reads series.

    A. Increase new program offerings with at least two new programs per year that have not been a traditional part of the event lineup by Q4 2016.

    B. In accordance with *Partnerships & Networking (IV)*, expand variety of Waukesha Reads partnerships based on themes of selected book.

IV. Strategy: Host a major exhibit.

    A. Feature a traveling exhibit, independent art showcase or cultural display in new event space for a period of no less than one month to attract a new population to WPL by Q4 2016.

V. Strategy: Raise public awareness about the importance of early literacy as a vital service offered by the Library.

    A. Register one thousand children for the 1000 Books Before Kindergarten (1KB4K) program by Q4 2016. Translate 1KB4K reading logs into Spanish by Q2 2015.

    B. Offer three programs for parents and caretakers that highlight the importance of positive early literacy experiences by Q3 2015.

SPACE NEEDS & FACILITY

Goal: The Waukesha Public Library will become fully equipped with the necessary capacity for more programs, major events, creative spaces and a more robust collection.

I.   Strategy: Implement the recommendations of the 2013 Space Needs Study by Engberg Anderson, with special consideration for painting and basic aesthetic upgrades.

    A. Expand program and event space by at least 100% by Q4 2016.

        1. In accordance with *Budget & Finance (II) (A)*, develop plan for securing, processing and promoting naming rights for various areas of the building by Q4 2016.

II.   Strategy: Address shelving overcrowding issues.

    A. In accordance with *Collection Development (II) (A)*, develop an independent plan outside of the scope of the 2013 Space Needs Study by Q4 2015 to address inadequate shelving space.

III.   Strategy: Address parking issues.

    A. Work with City of Waukesha Administrator and other City departments to develop a plan for increasing patron parking by Q4 2016.

IV.   Strategy: Expand and promote Public Art Collection, and increase creative opportunities offered at the Library.

    A. Increase the permanent art collection as donations allow, with at least one major installation by Q4 2016.

    B. Offer at least 12 art-based programs per year by Q4 2015.

        1. Include at least two featured artists who have contributed to the Library's collection.

    C. Highlight the Public Art Collection by developing multimedia informational presentations for web and social media delivery by Q4 2015.

V.   Strategy: Maintain facility aesthetic and function.

    A. Develop infrastructure and furniture maintenance & replacement plan by Q4 2015.

    B. Further develop active recycling and waste disposal plan by Q4 2014.

STAFF DEVELOPMENT

Goal: Ensure best practices by giving our staff the tools and skills they need to continue to be valuable, contributing members of the Library.

I. Strategy: Provide in-house staff training on an annual basis.

    A. Teach small group classes with Microsoft Outlook, Excel, Word, Adobe Photoshop, Illustrator and InDesign to refresh workplace skills and to better utilize staff talent and interest. Begin this process no later than Q3 2014, and track completion rate for each participant.

II. Strategy: Require annual professional development of specific staff and include in job evaluation process.

    A. Develop a plan by Q1 2015 for staff professional development that accounts for participation.

Goal: Ensure best practices by giving our staff the technology and skills they need to continue to be valuable, contributing members of the Library.

I.   Strategy: Redesign Waukesha Public Library website.

    A. Using a Content Management System (CMS), design, build and launch a new website with a focus on simplicity and ease-of-access for patrons by Q2 2015. Provide staff training prior to the launch and feature a machine-translated Spanish-language version to ensure access by entire patron base.

II.   Strategy: Implement a Payment Service Provider (PSP) to allow for digital payment.

    A. Using PayPal or other appropriate PSP, build a payment acceptance system through the website that allows for Library patrons to pay membership dues, special event fees, and donations by Q2 2015.

III.   Strategy: Focus on self-service stations to increase efficiency of technology tasks.

    A. Create a simple, patron-based self-serving scan/print/faxing station by Q1 2015.

IV.   Strategy: Supply tools necessary to incorporate MakerSpace elements into program lineup and staff use.

    A. Select vendor and secure independent funding for introduction of a 3-D Printing/Design Station for programming use and internal tasks by Q4 2014.

V.   Strategy: Form staff-based Technology Committee.

    A. Create a cross-departmental Technology Committee that includes technology staff, administrators, managers and other personnel by Q4 2014.

APPENDICES

I. METHODOLOGY

A detailed narrative of the framework, accuracy, margin of error, outliers and conclusions of the SWOT survey results.

II. SURVEY RESULTS

A tabled list of all of the survey results, separated into eight sections: SWOT Weaknesses, SWOT Opportunities, SWOT Threats, Areas to Explore, Areas to Improve, Areas to Reduce, Additional Comments and SWOT Strengths. Lists are organized by popularity.

METHODOLOGY

FRAMEWORK

A Relative Frequency Distribution (RFD) was used to analyze 2,229 individual lines of data in eight separate sections as delineated in the SWOT survey: **Strengths**, **Weaknesses**, **Opportunities**, **Threats**, **Areas to Improve**, **Areas to Reduce**, **Areas to Explore**, and **Additional Comments**. Data analysis tool Numbers 3.1 on the Apple platform was used to analyze the dataset; this large set of qualitative data produced multiple variables that were examined considering the following formula in a spreadsheet for each one of the of the survey sections:

Single Word Frequency using:
*=COUNTIF(begin_range:end_range,"*identifier*")*

Multiple Word Frequency using:
*=COUNTIF(begin_range:end_range,"*identifier*")+COUNTIF(begin_range:end_range,"*identifier2*")…"*identifierX*")*

Bare-minimum language was used to incorporate multiple instances of similar concepts:
"comput" was used to ensure that all examples of "compute", "computer", and "computers" were satisfied.*

A qualitative mathematical mode was not available due to limitations of the software. High frequency identifiers were chosen manually after a human-based visual inspection of the data, along with other tools including tag clouding and frequency visualization lists. As with most samples containing qualitative data, the RFD was unable to accurately pinpoint every instance of a word, phrase or concept, so the sample was sorted manually, ensuring that two major objectives were met: first, the data was placed into classifications with human-based oversight to ensure completion; and second, it guaranteed a human-based review and acknowledgement of every single response. This manual process is incredibly time-consuming, but adds a unique value that only this style of data analysis can produce.

It is important to note that the 2,229 lines of data can and will be applied to areas outside of the scope of the Strategic Plan. These include, but are not limited to, a general to-do list that can be assigned to departments to attend to

immediately, and they can also provide excellent goals for staff members during performance evaluations. In fact, the data used for the Strategic Plan has a very simple purpose: it allows us to weigh all of the responses to gain valuable insight about direction, philosophy and policy as identified by five separate stakeholder groups. We can then apply strategies that will address the specific issues throughout the overall dataset.

Out of 2,229 lines of qualitative data, the breakdown is as follows: **SWOT: Strengths, 768**; **SWOT: Weaknesses, 474**; **SWOT: Opportunities, 360**; **SWOT: Threats, 246**; **Areas to Improve, 122**; **Areas to Explore, 98**; **Areas to Reduce, 86**; and **Additional Comments, 75**.

In preparation for this process, the survey results were intentionally made blind with knowledge that data broken down by stakeholder group would still be available for other uses beyond that of the Strategic Plan. Because the 2,229 responses were put into one set before the analysis, it is possible, however unlikely, that responses were organized outside of the intention of the respondent. For example, it is likely that a response such as "Technology Training for Staff" in the Opportunities dataset was produced by a respondent who identified themselves as a "Staff Member." However likely this may be, it was not independently confirmed and must be mentioned as a potential inaccuracy. An assumption was made that for the purposes of this Strategic Plan, all comments exist for the betterment of the organization regardless of response origin, so this did not affect the overall outcome.

The analysis was not performed by consensus because purely qualitative data is by nature subjective, and an individual interpretation must be intentionally applied to the examination. Logical consistency in this case is paramount to success, so splitting certain sections up to be analyzed by multiple parties would have increased the margin for error. Obviously, a certain amount of personal subjectivity when into the analysis, but accounted for at absolute most 50 responses, or <2.0%, after eliminating non-applicable responses. Fortunately, this does not affect utilizing the raw dataset as a to-do list or evaluative measure for staff development in the future.

Human error accounted for <1.0%, and there were a handful of Reverse Negative or Reverse Positive responses (these responses are when a respondent supplied an answer that highlighted a positive reaction instead of a negative one; i.e. the respondent wrote "parking is great" when all other respondents gave appropriate critical answers, or "parking is bad") at <0.5%. Reverse Negative scoring was not applied to these responses due to the limited number of instances throughout the survey. Given all of the preceding information, it is fair to assume a +/- margin of error of <4.0% and that the weighted tallies and results of the survey are not less than 96% accurate.

The Opportunities section had the highest amount of implicative answers, with some responses being placed into categories based on a subjective determination of what the intention of the respondent was. For example, a response of "digital revolution" went to the Collection Development category, as an assumption was made that the respondent's intention was to make a statement about the evolving nature of media content and delivery. Collection Development will play the largest role in this process in the future, so it seemed to be the most logical classification. This interpretation during the analysis may have slightly changed the intention of the respondent, but it happened so infrequently that it should be considered an anomaly and we have not accounted for it in the margin of error.

Finally, one could certainly argue that every aspect of the organization revolves around the Customer Service category, or that every response was in some way connected to the Philosophy & Relevancy category. This so-called "umbrella effect" was ignored so as to try to ensure the integrity of the responses.

SURVEY RESULTS

SWOT: WEAKNESSES

A. Total Responses: 474

Space Needs & Facility:	123
Technology:	59
Collection Development:	53
Customer Service & Marketing:	45
Internal Affairs & Human Resources:	35
Security & Safety:	25
Hours of Operation:	24
Parking:	19
Not Applicable (N/A):	16
Staff Development:	12
Spanish Language Collection & Services:	11
Relevancy & Philosophy:	10
Budget & Finance:	8
Collection Circulation:	8
Programs & Events:	7
Partnerships & Networking:	3

B. Total Responses: 494

Space Needs & Facility:	124
Technology:	66
Collection Development:	54
Customer Service & Marketing:	51
Internal Affairs & Human Resources:	35
Hours of Operation:	28
Security & Safety:	26
Parking:	21
Not Applicable (N/A):	16
Staff Development:	14
Programs & Events:	14
Budget & Finance:	13
Spanish Language Collection & Services:	11
Relevancy & Philosophy:	10
Collection Circulation:	8
Partnerships & Networking:	3

*18 of the 474 initial responses in **SWOT: Weaknesses** applied to multiple categories. These were segregated during the examination and were not included in Column A. Exact copies of each were created in order to classify them appropriately, often applying to more than one other category. This required a recount of the weighted final tally, reflected in Column B above.*

SWOT: OPPORTUNITIES

A. Total Responses: 360

Programs & Events:	76
Space Needs & Facility:	75
Customer Service & Marketing:	31
Internal Affairs & Human Resources:	31
Technology:	29
Collection Development:	26
Partnerships & Networking	25
Security & Safety:	6
Hours of Operation:	5
Not Applicable (N/A):	5
Spanish Language Collection & Services:	5
Budget & Finance:	3
Collection Circulation:	2
Relevancy & Philosophy:	2
Staff Development:	2

B. Total Responses: 399

Programs & Events:	86
Space Needs & Facility:	80
Technology:	48
Customer Service & Marketing:	41
Collection Development:	37
Internal Affairs & Human Resources:	32
Partnerships & Networking	29
Budget & Finance:	11
Staff Development:	7
Security & Safety:	7
Hours of Operation:	5
Not Applicable (N/A):	5
Spanish Language Collection & Services:	5
Collection Circulation:	4
Relevancy & Philosophy:	2

SWOT: THREATS

A. Total Responses: 246

Security & Safety:	65
Budget & Finance:	38
Relevancy & Philosophy:	32
Internal Affairs & Human Resources:	25
Collection Circulation:	21
Not Applicable (N/A):	19
Technology:	15
Space Needs & Facility:	14
Parking:	9
Collection Development:	3
Spanish Language Collection & Services:	1
Hours of Operation:	1

B. Total Responses: 250

Security & Safety:	65
Budget & Finance:	40
Relevancy & Philosophy:	32
Internal Affairs & Human Resources:	25
Collection Circulation:	21
Not Applicable (N/A):	19
Technology:	15
Space Needs & Facility:	16
Parking:	9
Collection Development:	3
Spanish Language Collection & Services:	1
Hours of Operation:	1

*37 of the 360 initial responses in **SWOT: Opportunities** and 3 of the 246 initial responses in **SWOT: Threats** applied to multiple categories. These were segregated during the examination and were not included in Column A. Exact copies of each were created in order to classify them appropriately, often applying to more than one other category. This required a recount of the weighted final tally, reflected in Column B above.*

AREAS TO EXPLORE

A. Total Responses: 98

Not Applicable (N/A):	30
Programs & Events:	25
Collection Development:	13
Space Needs & Facility:	8
Technology:	3
Customer Service & Marketing:	2
Partnerships & Networking:	1
Spanish Language Collection & Services:	1
Staff Development:	0

B. Total Responses: 117

Programs & Events:	32
Not Applicable (N/A):	30
Collection Development:	24
Space Needs & Facility:	14
Technology:	9
Partnerships & Networking:	3
Customer Service & Marketing:	2
Spanish Language Collection & Services:	2
Staff Development:	1

AREAS TO IMPROVE

A. Total Responses: 122

Not Applicable (N/A):	24
Collection Development:	22
Customer Service & Marketing:	13
Space Needs & Facility:	11
Programs & Events:	10
Technology:	7
Spanish Language Collection & Services:	6
Hours of Operation:	3

B. Total Responses: 158

Collection Development:	33
Programs & Events:	27
Customer Service & Marketing:	25
Not Applicable (N/A):	24
Space Needs & Facility:	21
Technology:	14
Hours of Operation:	8
Spanish Language Collection & Services:	6

AREAS TO REDUCE

A. Total Responses: 86

Not Applicable (N/A):	38
Collection Development:	35
Programs & Events:	4
Space Needs & Facility:	3
Internal Affairs & Human Resources:	2
Hours of Operation:	2
Customer Service & Marketing:	2

B. Total Responses: 87

Not Applicable (N/A):	38
Collection Development:	36
Programs & Events:	4
Space Needs & Facility:	3
Internal Affairs & Human Resources:	2
Hours of Operation:	2
Customer Service & Marketing:	2

*15 of the 98 initial responses in **Areas To Explore**, 26 of the 122 initial responses in **Areas To Improve**, and 1 of the 86 initial responses in **Areas To Reduce** applied to multiple categories. These were segregated during the examination and were not included in Column A. Exact copies of each were created in order to classify them appropriately, often applying to more than one other category. This required a recount of the weighted final tally, reflected in Column B above.*

ADDITIONAL COMMENTS

A. Total Responses: 75

Positive Feedback:	49
Customer Service & Marketing:	9
Internal Affairs & Human Resources:	7
Programs & Events:	4
Space Needs & Facility:	3
Not Applicable (N/A):	2
Collection Development:	1

B. Total Responses: 75

Positive Feedback:	49
Customer Service & Marketing:	9
Internal Affairs & Human Resources:	7
Programs & Events:	4
Space Needs & Facility:	3
Not Applicable (N/A):	2
Collection Development:	1

None of the responses from this section applied to more than one category.

SWOT: STRENGTHS

A. Total Responses: 768

Collection Development:	197
Customer Service & Marketing:	190
Space Needs & Facility:	110
Collection Circulation:	93
Programs & Events:	67
Technology:	37
Internal Affairs & Human Resources:	34
Hours of Operation:	12
Partnerships & Networking:	12
Security & Safety:	10
Relevancy & Philosophy:	4
Parking:	2

B. Total Responses: 768

Collection Development:	197
Customer Service & Marketing:	190
Space Needs & Facility:	110
Collection Circulation:	93
Programs & Events:	67
Technology:	37
Internal Affairs & Human Resources:	34
Hours of Operation:	12
Partnerships & Networking:	12
Security & Safety:	10
Relevancy & Philosophy:	4
Parking:	2

*Many of the responses in **SWOT: Strengths** applied to more than one category, and every single one applied to the "Positive Feedback" category. This crossover was not considered in determining strategies (hence, it is not reflected in the dataset above), except to add justification for areas that have been identified as "continue to..." or "maintain effort to..."*

The more appropriate use for the responses in this category is to use them for staff commendation for job evaluation and promotional purposes.