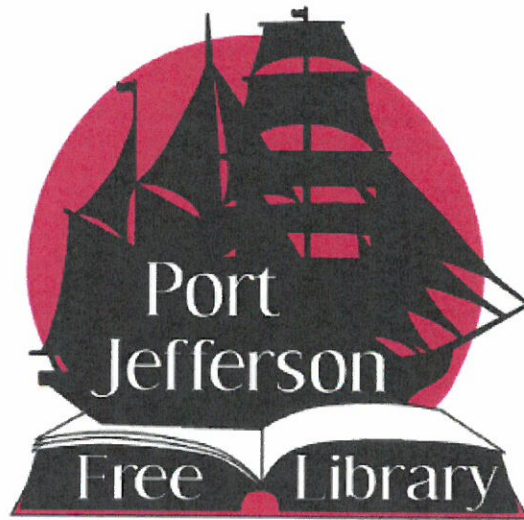


Port Jefferson Free Library

Strategic Plan 2015



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Port Jefferson Free Library wishes to thank the Village of Port Jefferson for its ongoing support for public library programs and services in our community. We would also like to express our appreciation to the Village residents as well as residents of the Miller Place and Mount Sinai School Districts who attended our focus groups or responded to our telephone survey, community leaders who participated in our leadership interviews, and staff of the Library who shared their ideas and insights with our planning team.

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A MESSAGE FROM THE BOARD PRESIDENT

On behalf of the Port Jefferson Free Library Board of Trustees, our Director, and staff, I would like to express appreciation to all who support our Library. This is an exciting time for us, and being a part of the development of the Library's new Strategic Plan, a truly significant endeavor, has been an honor.

The Port Jefferson Free Library Strategic Plan is the result of many hours of work on the part of many individuals – Library Board members, staff, and community volunteers. I offer my personal thanks for their dedication and hard work.

The Port Jefferson Free Library is continually recognized as one of the best small libraries in the country, providing excellent service, resources, programs, and community outreach for all residents. The Strategic Plan is not a plan which has the Library starting over, but rather, it serves as a directional tool which will enable us to improve what we already deliver, to adapt to changing needs, and to keep Port Jefferson at the forefront in public library service.

The challenge now is to ensure that our facilities and services are delivering optimum value to our patrons. The Plan provides a blueprint for building upon and enhancing our services while continuing to provide an open, welcoming environment where residents of all ages may meet, share ideas, and be entertained, educated and informed.

Laura Hill Timpanaro
President, Board of Trustees



ABOUT THE LIBRARY

Port Jefferson Free Library (PJFL), an *LJ Index* Four-Star Library for 2013, is located on the North Shore of Long Island and serves a combined population of approximately 36,000 which includes residents of the Village of Port Jefferson as well as the Miller Place and Mount Sinai School Districts. In 2013, the Library had 11,258 registered card holders and an annual operating budget of just over \$4 million. Governance is provided by PJFL's seven-member Board of Trustees elected at the Library's annual meeting. Trustees serve five-year terms and meet ten times annually.

The Library's collection of more than 350,500 items in diverse print and non-print formats appeals to customers of all ages. PJFL's resources make it possible for customers to complete research assignments, look for jobs, learn a language, obtain tax forms, download free materials, or delve into local history.

The Library is a busy community hub! Output measures for the period 2010-2013 reveal an increase in six of nine indicators. A staff of 47 employees hosts almost 217,516 visitors each year. In 2013 alone, librarians answered over 57,000 questions; 20,821 residents attended Library-sponsored programs; and 16,344 individuals used library computers. The Library enjoys a very favorable reputation in the community and is known for providing high quality, personalized services.

The Library is a member of the Suffolk Cooperative Library System which supports member libraries by providing:

- Resource sharing through cooperative collection development;
- An Integrated Library System;
- Delivery service;
- Interlibrary loan;
- Professional development and continuing education;
- Consultation; and
- Awareness and advocacy support.

To sustain the Library's reputation and its quality services, Trustees and staff will be called on in the coming years to:



- Prepare for the possibility of a reduced tax base and a reduction in public funding when the nearby Long Island Power Authority plant closes or is retrofitted;
- Develop a plan to take maximum advantage of the adjacent property which PJFL purchased in 2010;
- Determine the merits of continuing to rent the property which currently houses the Teen Center and Friends of the Library bookstore;
- Identify strategies for better serving and engaging the residents of Miller Place and Mount Sinai; and
- Secure funds to improve the facility so that the Library can continue to provide quality services to a discriminating population.



SITUATION ANALYSIS

Port Jeffersonians have a strong sense of community. They respect the history of Port Jefferson and are committed to maintaining the amenities and traditions associated with life in the Village—including their local public library.

Demographic Shifts

Population growth has slowed since the 1990's. Data from the 2010 Census shows a decrease in population of just over 1% between 2000 and 2010. The 2010 Census also reveals that 17% of the population is now over the age of 65 (cf. 14% for New York overall) and 28% of Village households are occupied by a sole resident. Future population growth is likely to be attributable to the phenomenon of long-time residents selling homes to younger families with children, the realization of the proposed Waterfront Revitalization project, and the possible construction of multi-unit complexes tailored to the needs and preferences of the 55+ market.

It is the composition, rather than the size, of the population served by the Library that has changed most significantly. The 2010 Census indicates an increase proportionally in minority residents—particularly within the Asian and Latino communities—although Port Jefferson is still relatively homogeneous. Only 12% of the population is foreign born (cf. 22% for New York overall), and 13% speak a language other than English in their homes (cf. 30% for the state as a whole).

Port Jefferson residents are educated, affluent, and discriminating consumers. 22% (cf. 19% for New York overall) hold a Bachelor's Degree, and 36% (cf. 14%) hold a graduate or professional degree. Average *per capita* income is \$51,937 (cf. \$32,104) and the median household income is \$108,060 (cf. \$57,683). Real estate is expensive: the median value of owner-occupied housing units was \$525,800 (cf. \$295,300 for the state overall) over the period of 2008-2012.

The Village is Evolving

Life in Port Jefferson is changing in other ways as well.

- Local businesses are either closing or relocating, prompting concerns about the vitality of the business district.
- A growing number of people are working in home offices rather than engaging in a daily commute.
- Technology use is pervasive.
- School curricula are shifting emphasis to STEM and the Common Core.



- Attracted by the small town culture and desirable quality of life, individuals who have grown up in the Village leave to attend college and then return to settle.

Challenges that Lie Ahead

Port Jefferson Free Library is in the enviable position of being well-funded in comparison to peers. It enjoys a solid base of loyal supporters and very productive relationships with civic leaders. However, looking to the future, Trustees will have to make far-ranging decisions that come with considerable financial considerations.

- How can the Library keep pace with evolving and costly technology and identify a differentiating niche in public access to technology?
- What are the best strategies for responding to the needs of a population that is becoming more economically and culturally diverse?
- At the prospect of a diminished tax base, what new revenue streams can be developed to sustain quality services?
- How can the Library balance the needs of residents at both ends of the age spectrum—the very young children of newer families and the much larger population of individuals over the age of 65?
- How might the Library partner with the Village to revitalize the business district and support resident-entrepreneurs?
- What mutually beneficial partnerships to maximize resources might be forged with other public and private entities?
- What services should be reconfigured, and over what timeframe, to step up to the changing needs of the community?



PROJECT METHODOLOGY

A comprehensive assessment of internal operations, services, facilities, and technology laid the groundwork for the development of the Library's new strategic plan. The research was designed to:

- Identify how customers will want to use the Library in the future;
- Evaluate to what extent the current facility satisfies customer expectations and preferences;
- Gauge levels of community support for enhanced and/or expanded services;
- Determine how the Library can take maximum advantage of the adjacent property;
- Address the problems posed by the Teen Center being currently housed in a detached rental property;
- Develop responses to the possibility of reduced public funding;
- Determine the diverse needs of individual population segments including families with young children, teens, seniors, young professionals, etc; and
- Apply best practices in public library service to the plan.

In preparation for its first onsite visit, the consulting team reviewed Census data, the 2011 building conditions report, relevant school district reports, output numbers for the past three years, and community planning documents.

To better understand the Library's service environment and Library operations, the consulting team toured the Library and the surrounding community and met with the Board of Trustees and senior management team. These sessions included the facilitation of a SWOT (strengths, weaknesses, opportunities and threats) analysis of the Library's current situation.

Staff members were invited to participate in an online survey to offer their perspectives on Library services, future priorities, and the facility. At the same time, Trustees were asked to respond to a survey focused on issue and challenges relevant to the Board. Five of seven Trustees completed the questionnaire.

The lead consultant facilitated five focus groups representing the community's young professionals, teens, parents of young children, seniors, and residents of the two contract districts. The discussions focused on their satisfaction with current PJFL services,



suggestions for future improvements, and commitment to the Library and its future success.

Trustees and Library staff conducted 15 in-depth interviews with individuals identified by the Board as leaders in the Library's service area. The interviews covered a range of topics, including:

- Perceptions and reputation of the Library;
- Roles that the Library plays or might play in the community;
- Evolving community composition and needs;
- Adequacy of the facility and technology assets;
- Library marketing and communications; and
- Future priorities.

The consulting team benchmarked the Library to assess its performance against that of 12 peer libraries in the country. Peer libraries were selected on the basis of service area demographics, population, and number of branches. Inputs (i.e., government income), outputs (i.e., circulation, reference), and key analytics (i.e., cost per circulation) were compared using the most recently published data (2011) from the Institute for Museum and Library Services (IMLS).

To confirm the qualitative information gathered during interviews and focus groups, a telephone survey of randomly selected households in the Library's service area was conducted. Completed interviews numbered 200, yielding a margin of error of +/- 7 % at the 95% confidence level across the entire population of Port Jefferson residents age 18 and older. The telephone survey:

- Explored the roles that PJFL plays or might play in Port Jefferson;
- Determined current frequency of use patterns;
- Identified barriers preventing some residents from using public library services;
- Evaluated current levels of awareness of library programs and services among user and non-user market segments;
- Determined which programs and services residents would wish to have expanded in the future;



- Assessed the availability of technology within households; and
- Measured support for funding.

The consulting team conducted a comprehensive facilities and space planning assessment of the Library, including the main building, the adjoining property, the Scented Cottage property, and the rented space housing the Teen Center and the Friends Bookstore. Space challenges identified in the assessment were categorized as either an immediate need, an issue to be addressed as soon as possible, or a possibility to consider over the long term.

On completion of the research, the consulting team facilitated a Planning Summit. The agenda included topics such as facility renovation, fundraising, organizational development, technology needs, community partnerships, and the Library's role as community center.

The resulting plan, comprising six strategic priorities, was submitted for review to the Library Director and subsequently to the Strategic Planning Committee for feedback. The final plan document was presented to the Library Board for approval.



STRATEGIC PRIORITIES

Priority One: The Library as a Community Convener

Research Indicators

No longer viewed as simply warehouses for books, libraries across the nation are becoming the social and cultural focus of communities where neighbors and friends come together. Clearly, Port Jefferson is no exception. The local hardware store and other similar gathering places are no longer part of the Village landscape, leaving both long-time residents and new arrivals seeking a sense of community belonging.

Demographic shifts are also driving an increased interest in the public library as a community hub. Seniors in their focus group shared their sense, confirmed by census data, that a growing number of Port Jefferson residents live alone. Increasing cultural diversity calls on community institutions to reach out to newcomers so that they might assimilate into Village life. The Library is credited with bridging the community's growing economic divide by providing free access to technology, materials, programs, and services. Residents of contract districts characterize the Library as the place where they may forge connections with their neighbors and with residents of the Village.

Research respondents identified the Library as the only place in Port Jefferson that offers free programs, and those who currently use the Library expressed an appreciation for its current offerings. Nevertheless, universally, respondents have an appetite for more programs and services, especially for seniors and school-age children—both young and old. Young professionals reported there is very little for them to do in Port Jefferson other than going out to eat or gathering in a bar. They voiced an interest in the Library offering cultural enrichment programs—especially if the events were to offer an opportunity for social interaction.

There is a direct correlation between the Library's achieving its potential as a community gathering place and its capacity to offer programs and host events. The facility assessment indicates that the size and ambiance of PJFL's current basement meeting room limit what is possible. Indeed, when benchmarked against 12 peer libraries, PJFL ranked in the top third for the number of programs and program attendance *per capita*, but in the bottom third in children's program attendance. Civic leaders concur that the Library plays an important role in the community and needs additional updated meeting rooms that can accommodate an expanded program curriculum.



Strategic Responses

Short Term

- Engage representatives of contract districts in conversations pertaining to Library programs and services.
- Work with the Village to address the parking situation for residents of contract districts using the Library.
- Evaluate the relevance of the current schedule of programs when considering specific market segments (tweens, residents of culturally diverse communities, young professionals, seniors, etc.)
- Explore community-created programs, such as Podium and TEDx Talks.
- Develop a menu of intergenerational programs.
- Honor and cultivate closer connections with local businesses by inviting them to create programs which simultaneously educate library customers and publicize their businesses.

Long Term

- Improve space for both large and small group meetings.
- Focus resources on sustaining the Library's role as the community information center for Port Jefferson.
- When renovating the facility, create spaces for more displays of community interest.
- When renovating the facility, explore adding a greeting area or atrium where patrons can enjoy modest coffee service, store strollers, or use cell phones.



Priority Two: The Library as Portal to Technology

Research Indicators

The population of Port Jefferson is educated and tech savvy. A high percentage of residents have access to technology in their homes: 85% have high speed Internet access; 75% have a laptop computer; 49% have an e-reader; and 62% have a smartphone.

At the same time, residents are aware that there are economically disadvantaged individuals in the community who depend on PJFL for computer and Internet access. Ranking in the bottom third among peer libraries for public computing, the Library currently cannot measure up to these needs. Recognizing this deficit, staff rates the provision of up-to-date technology, space for computer training, and an upgraded website as high priorities.

The facility assessment indicates the space as it is currently configured is outdated, inadequate to demand, inappropriate for technology demonstrations and training, and actually a deterrent to computer use. The report calls for the Library to adopt the best practice of placing computers throughout the building for the convenience of customers.

While civic leaders identified technology access and training as community priorities, they demonstrated a limited understanding of the role the Library plays in the technical competence and access of residents. They called for the Library to stay “ahead of the pack” and provide greater leadership in public technology.

Teens characterized Library technology as outdated and inadequate. Young professionals expressed the belief that the community already has access to much of the technology that libraries might provide, noting they might be more inclined to visit the Library if it offered technology they could not access otherwise. Seniors referenced the rapidity with which technology is changing and the need for training that would enable them to stay up to date. Overall, research respondents are in agreement that the Library has not adequately educated the community about its technology assets.

Strategic Responses

Short Term

- Create a visionary technology plan.
- To assist the Library with technology planning and training, establish a technology advisory committee comprising community residents with expertise in this area.
- Explore technology partnerships with public and private sector institutions in the community.



- Introduce the use of new Edge Benchmarks to evaluate the Library's technology.
- Evaluate the menu of Library programs to determine if there is an appropriate balance of technology and non-technology topics.
- Allocate funds to upgrade the Library's website.
- Evaluate the current use of technology for internal communication.
- Expand the Living Heritage programs.

Long Term

- When making decisions about renovations, allocate space for computer bars and more computer terminals throughout the Library.
- Create a new multi-use technology area.
- Solicit additional customer input regarding software and hardware that they would use at the Library rather than purchase themselves.
- Explore the potential of new technology provision models, such as maker spaces.
- Expand technology access for individuals with disabilities or who are otherwise without access.



Priority Three: The Library as Public Asset

Research Indicators

In the current climate of fiscal conservatism, most public libraries are challenged to raise money to supplement their public funding. PJFL is the exception: when compared with peers, the Library is adequately funded at the present time. The telephone survey suggests that public support is strong, with 93% of respondents agreeing that PJFL plays an important role in the community and 92% concurring that adequate public funding is important. When asked if they would support a tax increase to improve or expand public library services, 55% of respondents indicated that they would.

However, conversations with community leaders suggest the financial outlook may change if the Long Island Power Authority plant closes. Such a closure would significantly decrease the tax base and increase competition for public funding. This development would, in the opinion of several civic leaders, compel the Library to secure financial support from other sources.

Discussions with staff and Trustees suggest that the Library has not felt the need to undertake any significant fundraising efforts to date. Currently, the only non-public sources of revenue are from the Friends book sale, fines, and other fees. If the Board moves ahead with the recommendations set forth in the Facilities Study, the Library will be obliged to launch an unprecedented program of fundraising. With no past history in fundraising nor infrastructure in place, this prospect is daunting.

Strategic Responses

Short Term

- Arrange for Board and Friends fundraising and advocacy training.
- Develop a comprehensive fundraising plan.
- Explore the establishment of a Foundation.
- Conduct a campaign feasibility study (community capacity; sources of major gifts; formation of campaign committee; campaign infrastructure, plan and materials; brand and case development).
- Seek experienced fundraising counsel.



Priority Four: The Library as Center for Lifelong Learning

Research Indicators

Residents of Port Jefferson are well educated and value quality schools, skill development, and the pursuit of knowledge, and they closely associate the Library with educational opportunity for all. Community leaders and residents rank support for education as a Library priority, followed closely by the need to expand educational services and materials for children. Indeed, the Library support for education encompasses a broad spectrum of programs and services, including print and online research resources, summer reading, story times, ESL and literacy, enrichment for seniors, and quiet places to study.

While children's and teen services are considered an institutional strength, there is room for improvement. Benchmarked against peers, PJFL ranks in the bottom third for children's program attendance. Tweens and teens (ranging in age from the 6th through 10th grade) expressed an interest in a better balance between gaming and other types of creative and educational programming. They also reported that the Teen Center is not conducive to study nor other school- related work.

Community leaders reported that because the school district no longer provides community classes, there is a need for the Library to step up and offer continuing education and ESL classes. Leaders—including those in the schools— stress the importance of close cooperation between the Library and educational institutions. They also perceive a need for greater Library support and programming for older school-age children.

Strategic Responses

Short Term

- Identify best practices by connecting with librarians who are known for forging successful school partnerships.
- Evaluate current working relationship with schools in the context of best practices.
- Determine the need for a formal memo of understanding which would detail respective responsibilities of the Library and schools.
- Package all educational support programs and services to promote to students, classroom instructors, school administrators, and parents.
- Solicit input from tweens and their parents regarding their needs and preferences regarding library services, especially as facility improvements are planned.



Long Term

- Explore the community's need for additional ESL classes for Chinese, Japanese and Asian Indian residents.
- Solicit input from seniors regarding their interest in lifelong learning programs.
- Explore participation in existing programs such as those associated with Creative Aging initiatives.
- Focus Library collections and technology—especially for content creation—to align with STEM curricula.



Priority Five: The Library as Efficient and Effective Facility

Research Indicators

Facility limitations inhibit the Library's capacity to meet the community's needs and provide the best possible services. The Facilities Study offers both short- and long-term recommendations for resolving problems which affect staff efficiency and the visitor experience

All market segments appreciate the central location of the Library. With the exception of seniors, who expressed the strongest attachment to the building in its present condition, residents indicate that their experiences as Library customers would improve if the facility were refurbished, space reconfigured, and parking improved. The community likes the Library's cozy, small-town intimacy and is concerned that improvements could result in a modernistic design or ornate Taj Mahal that would not conform to the character of the Village.

Civic leaders and the general public hold the Library accountable for the long delay in making a decision regarding the use of the 114 Thompson Street property, considered an eyesore by many. On top of that, the annual cost of renting and staffing the facility that currently houses the Teen Center and Friends bookstore exceeds \$200,000, an expense that may not be sustainable in the long term.

Strategic Responses

Short Term

- Explore viability and costs of alternate scenarios detailed in the Facilities Study.
- Develop a plan for deciding whether a construction project is a go or not.
- Assess management "bench strength" to determine if the Director and staff will have the resources to devote to fundraising and construction. Rather than hiring or repurposing staff, consider engaging consultants to fill short-term needs.
- Provide Board and Staff training to clarify roles and responsibilities of Trustees in a construction project.
- Develop cost estimates for professional services that will be required and determine how to pay for them:
 - Consultant's "Letter to the Architect"
 - Architect



- Interior designer
- Project manager/coordinator
- Integrate fundraising strategy into construction planning.
- Identify and review successfully renovated libraries to become well-educated about the process, possibilities, and pitfalls.
- Develop a public information plan that begins when the public is first told about the renovation project.



Priority Six: The Library as High Performance Organization

Research Indicators

The SWOT analysis and staff survey indicate a lack of clarity and application of best professional practices regarding the respective roles of Trustees, senior Library management, staff, and Friends. The Friends group lacks a vision for how it can best serve the Library in the years ahead, and there is a need for rejuvenating the group and attracting new members. To achieve goals and oversee major initiatives, such as facility construction or fundraising, all internal stakeholders must understand their responsibilities and be prepared to fulfill them.

Staff express great pride in providing outstanding customer service, and morale appears to be good. By all accounts, the Director has forged a positive working relationship with staff—evidenced by the fact that the Union has filed fewer grievances. Staff priorities for the future expansion and enhancement of services are aligned with those of community leaders and the general public. Nevertheless, without succession planning that anticipates future staffing and training needs, updated job descriptions, an upgraded program of performance, and training planning and resources, the Library will not be able to progress.

Evidence points to the need for the Library to work on its external relationships as well. While residents of contract districts are required to pay for Library services, they express frustration over having no voice in decisions about policies, programs and services. Conversations with civic leaders suggest that, to date, their interactions with the Library have been limited. To garner their support for the Library, Trustees and the Library Director will have to intensify efforts to communicate and build mutually productive relationships with Village “influentials”.

Strategic Responses

Short Term

- Provide Trustees with training on the attributes of high-performing boards and the respective roles and responsibilities of Trustees, the Library Director, staff, and Friends.
- Explore options for giving contract district residents a voice in Library decision making.
- Evaluate the effectiveness of current lines of communication between staff, the Director, and the Board.
- Focus on team building throughout the organization.



- Institute an annual Board self-assessment.
- Develop a succession plan for Library staff and the Board of Trustees.
- Identify the individual “second in command” when the Director is not at the Library or devoting significant time to fundraising and/or construction efforts.
- Evaluate the effectiveness of the current performance appraisals.
- Determine the need to update job descriptions with technology competencies.

Long Term

- Create a recognition program for staff and Library customers.
- In preparation for a fundraising effort and construction project, work with the Friends to define their participation and to expand the membership in the Group.
- Consider formation of a young Friends group.



ADDENDUM:

The need for and opportunity to purchase additional space—205 East Main Street

Research Indicators

Improved parking and reconfigured space are two of the greatest concerns of residents who wish to attend programs and utilize services at the Library.

With the opportunity to purchase additional space at 205 East Main Street, the ability of the Library to meet these needs is greatly enhanced. In addition to maintaining a hub of activity, the Library can preserve the historic nature of East Main Street while enhancing patron services and maximizing cost efficiencies.

The Library will have the opportunity to explore sustainable energy mechanisms, containing energy costs and maximizing opportunities to provide relief during times of crises and power outage; the development of green space, outdoor and indoor gathering space for social interaction and relaxation; and the feasibility of providing Library space for use during non-library hours.

Strategic Responses

Short Term

- Explore the viability and costs of purchasing 205 East Main Street.
- Consider hiring a consultant or architect to assist in the soliciting of public input regarding the development of the Library property.
- Review and consult with other libraries that provide after-hour meeting space and that have configured green space.

Long Term

- Create a community anchor and cultural center where residents can congregate, discover, create, learn, and enjoy the Library offerings.
- Increase foot traffic to local businesses.
- Consolidate Library services on Library property.