



2019–2023



## Strategic Plan Report

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HARVARD, MA 01451

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FACILITATOR

## Introduction to the Plan

Harvard, Massachusetts, is a rural community in Worcester County. About 32 miles west of Boston and 22 miles northeast of the city of Worcester, Harvard is home to about 6,000 citizens and has a colonial history that extends back to 1732, the year of its incorporation. The Harvard Public Library is in the town center on the same campus as the town's public schools. The original Harvard Public Library first opened in 1886. A Children's Room as well as the Hapgood Room and a Hapgood Memorial were added to that building in 1905. More than a century later, in 2007, the library moved to its current location, an award-winning renovation of the 1878 Old Bromfield School.

As set forth by the Massachusetts Board of Library Commissioners (MBLC), "Libraries must have an approved Long-Range Plan on file with the Massachusetts Board of Library Commissioners in order to apply for Library Services and Technology Act (LSTA) funds." To meet this requirement and to evaluate the library's present and future needs, the library trustees committed in the summer of 2018 to once again undergo a formal planning process. Given the success of the previous generation strategic plan, the trustees engaged the same planning facilitator, Jonathan Costa of Litchfield, Connecticut, to organize and guide this new work. Parallel to the process used in 2011, the primary purpose of the second plan design was to have a representative group from the Harvard library community explore the current and anticipated conditions impacting the library and identify a small number of data-based goals that could guide the future work of the staff and trustees. Once again, the trustees agreed that the completed plan should:

- Derive support from a broad cross-section of the community;
- Articulate two to four priority strategic goals that will serve as key areas of developmental focus over the next several years;
- Provide suggested indicators of success, strategies, and action plans for continuously improving performance and/or building capacity in those areas of focus.

Working with the facilitator, the trustees formed a Strategic Planning Team, which was organized by trustee Davida Bagatelle. Eventually over 20 individuals volunteered and were charged with the responsibility of carrying out the planning process. These volunteers and staff represented library constituents, staff, and trustees. As a result, members of the Harvard community and professional staff from the library came together for this effort and contributed upwards of 40 hours of their own time to the process. The team included Davida Bagatelle, Daisy Benson, Kristeen Bolduc, Cary Browne, Meaghan Bychowski, Didi Chadran, Gail Coolidge, Lisa Daigle, Lisa Gagnon, Kirsti Gamage, Marty Green, Stacie Cassat Green, Ellen Harasimowicz, Vivien Jamba, Abby Kingsbury, Jen Manell, Sarah Saleh, Billy Salter, Cricket Segaloff, and Mary Wilson. The Board of Trustees of the Harvard Public Library would like to thank all who participated for their time, energy, and commitment to this important work.

The planning process was divided into three phases. Phase I was designed to create a solid planning foundation, ensuring that the Strategic Planning Team was properly organized and that everyone shared the purpose and expectations for the process. This included a review of the progress made to date on the goals from the last plan and a revision of the library's Mission and Value Statements. This content is

shared in the next section of this document. Phase II involved the collection of relevant performance data, sorting through that information, analyzing and discussing what was found, and then identifying the most critical issues for this next generation plan. The process ensured that the selected goals were supported by a range of library constituencies, included associated indicators of success for each goal, and are accompanied by a roadmap for bringing library staff and volunteers together to solve the strategic issues created by the goals themselves. Phase III will be ongoing and is designed to select and plan for the appropriate action steps for the first six months to a year that will move the library toward accomplishment of its strategic goals.

## **Review of Past Actions**

The first activity the newly formed planning team undertook was a review of the progress and status of three goals that the trustees set and pursued as part of the 2013–2018 Strategic Plan. As they looked back on those goals, they reviewed the indicators of success and then considered what had been accomplished, what still needed to be done, and reflected on the importance of continuing the effort if the goal was still short of the intended outcome. The results of this reflection are detailed in the next section.

## Harvard Public Library 2013–2018 Strategic Goals

**Goal One:** Create and implement a long-term, mission-driven communications and information-sharing strategy that helps to promote and support the variety of assets and activities that make our Library unique.

Indicators of success:

- a) Wider use of all library resources
- b) Increased use of all library resources
- c) Increased knowledge of and awareness and participation in activities and events
- d) Increased number of patrons who want to hear and learn about library services and resources
- e) Increased range of knowledge, visibility, and presence in the Harvard community and beyond
- f) Continued patron satisfaction

Achievements	Challenges	Notes on Continuation
<ul style="list-style-type: none"> <li>• Year over year, all resources in our library have been used more</li> <li>• 71 percent of the town has an active library card</li> <li>• Frequent posts in 5 different media</li> <li>• Outreach and collaboration with school and community organizations</li> <li>• New website and logo launched</li> </ul>	<ul style="list-style-type: none"> <li>• Many new families are moving into Harvard; change in the demographics of town</li> <li>• Better signage for patrons</li> </ul>	<ul style="list-style-type: none"> <li>• Wayfinding needed</li> </ul>

**Goal Two:** Work with our community and staff to develop programming and space utilization options that allow for users of all ages to simultaneously enjoy the assets and activities that make our library unique.

Indicators of success:

- a) Appropriate use of the facility and space
- b) Reduction in complaints from staff and patrons
- c) Increased afternoon adult patronage
- d) Safety, security, and liability concerns addressed
- e) Increased satisfaction among students and parents
- f) Minimized disruptions in normal service delivery

Achievements	Challenges	Notes on Continuation
<ul style="list-style-type: none"> <li>• Established a culture of expectation with sign-in and code of conduct for students</li> <li>• Reassignment of use for some library spaces</li> <li>• Alignment of early-release activities with the schools</li> <li>• Positive feedback on increased programming for children, teens, and adult patrons</li> <li>• Introduction of Makerspace and STEM-focused activities</li> </ul>	<ul style="list-style-type: none"> <li>• Quiet spaces are not soundproof.</li> <li>• Main area of intensive use are the computer workstations.</li> <li>• Sound from the mezzanine can be an issue.</li> </ul>	<ul style="list-style-type: none"> <li>• Reevaluate space use throughout the building; develop a plan to prioritize, optimize, and improve use of space</li> <li>• Consider changing needs of patrons and changing roles of public libraries to support telecommuters, local artists, eLearners, students</li> <li>• Evaluate and improve gathering places both indoors and out</li> </ul>

**Goal Three:** Create and implement strategies that recognize the role that digital information resources and devices play in our Library and the lives of our patrons while at the same time maintaining the most important qualities that draw people to our facility.

Indicators of success:

- a) Offerings are used at high rates and capacity.
- b) Breadth of offerings increases over a defined period.
- c) Support for a variety of technology uses among patrons
- d) High rates of satisfaction among patrons
- e) Alignment of strategies with mission and assets

Achievements	Challenges	Notes on Continuation
<ul style="list-style-type: none"> <li>• Increased use of eResources</li> <li>• Availability of individual and group training on devices and eResources</li> <li>• Supporting the school district's 1:1 technology initiative; working with students and staff on activities and research using their school-provided iPads or MacBooks (during and after school hours)</li> </ul>	<ul style="list-style-type: none"> <li>• Aging AV resources are incompatible with newer tech demands and are often inoperative</li> <li>• Varying levels of patron skill and comfort with technology</li> </ul>	<ul style="list-style-type: none"> <li>• Increased wifi use requires improved speed and capacity</li> <li>• Conduct a technology assessment</li> </ul>

## Harvard Public Library Mission and Values

With those reflections complete, the Strategic Planning Team then revisited the Mission and Value Statements that were created as part of the first-generation plan. While everyone agreed they were still mostly relevant and appropriate, a productive discussion followed and both foundational documents were updated and focused.

### Library Mission (revised 9/22/2018)

Through our programs, resources, volunteers, and staff, the Harvard Public Library enhances the quality of life for all in the community by encouraging personal and intellectual growth in a welcoming, comfortable environment.

### Library Values (revised 9/22/2018)

- Responsiveness to our community and patrons
- Free and open access to a wide range of resources
- Protection of intellectual freedom
- Partnerships with schools and community organizations
- Integration of new and traditional services
- Preservation of historical resources

## Data Collection and Analysis

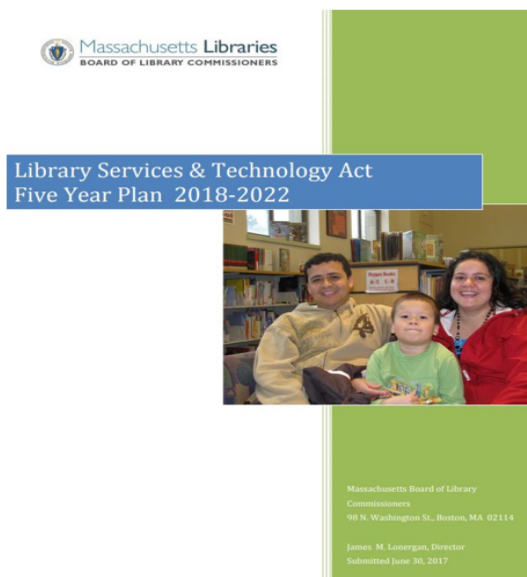
With the foundational frameworks revised, the Strategic Planning Team organized into three data collection teams designed to capture historic and current library performance data, examine the external environment, and fulfill the planning requirements as set out by the MBLC. The teams used available data, field research, and a community survey to complete their task. A review of the specific charges of the three data collection teams is listed below.

### Team One: (Internal) Current Library Success Metrics Data

- A. Traffic, service usage, circulation, and other currently available data presented in 3–5-year trends as available
- B. Other data determined by existing capacity, also on a 3–5-year trend as available
- C. ADA compliance issues

### Team Two: (External) Impact of a Digital Age and Harvard Demographic Profile

- A. Population and other demographic data for the town of Harvard—past, present, and predictions. What is the makeup of the community? Is it likely to remain the same or to change, and what impact will that have on the services the library provides?
- B. Impact of digital age on library services and operations—how will the digital age impact the services that public libraries provide, and how are they adjusting to accommodate and leverage this new reality?
- C. Implications of the focus areas from the new LSTA strategic plan (see graphic below)



#### ► Implications of the focus areas from the new LSTA strategic plan

- 1. Funding
- 2. Small Library
- 3. Services to Students
- 4. Public Health
- 5. Underserved Populations
- 6. Families
- 7. Homelessness
- 8. People with Disabilities
- 9. Digitization
- 10. Preservation
- 11. Access and Infrastructure



### **Team Three: Service Feedback Survey**

This team was tasked with interpreting the feedback gathered from the required constituent feedback survey. Using the same basic framework as the previous plan, the entire Strategic Planning Team participated in a revision of the survey instrument. The final product had 28 questions. The items were a mix of scale, prioritization, and open response queries covering topics on service, hours and library usage. Open for roughly nine weeks, 400 Harvard residents answered the survey and provided almost 1,000 separate write-in responses.

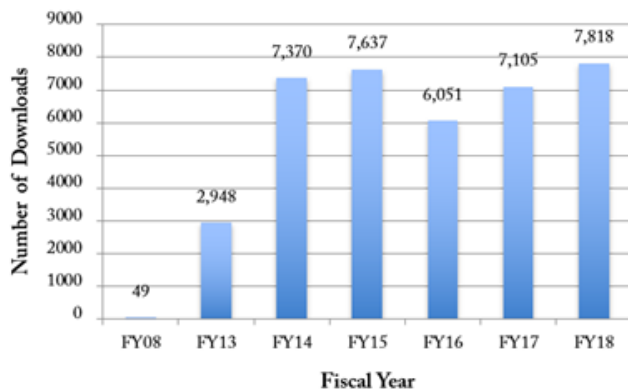
## Data Collection Results Summary

With all these data collected, the Strategic Planning Team convened for a full-day retreat in the library's Volunteers Hall on Sunday, December 2, 2018. During this session, the data teams and the survey group presented and discussed their findings. The purpose of these reports generally is to help the group identify long-term internal performance issues, to determine the most significant external trends and implications, and then to see where there is convergence between them. As each group reported out, their peers were listening, asking questions, and taking note of their own observations of the outcomes. Among dozens of items that were discussed, a few stood out as prominent.

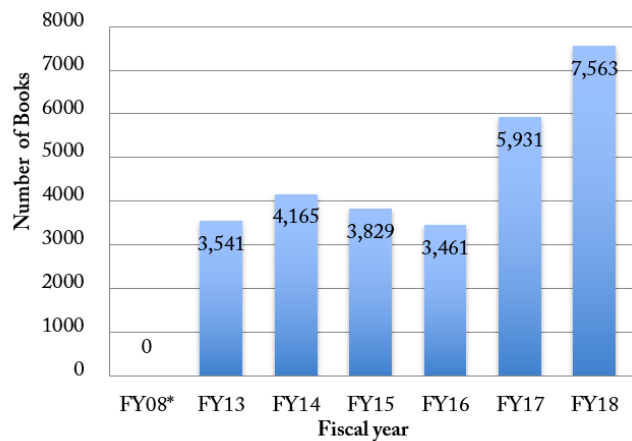
### Team One

Young adult and electronic resource downloads/usage continue to grow at a significant pace:

#### Ebook Circulation

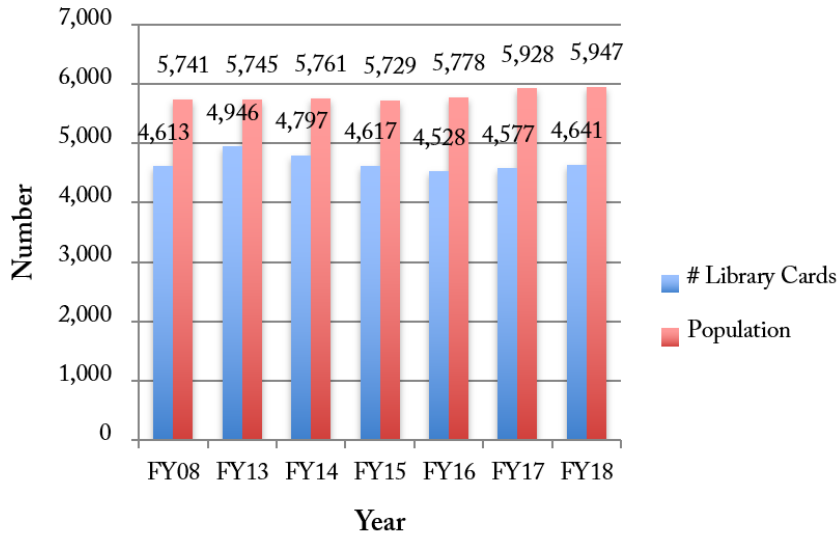


#### Young Adult Book Circulation

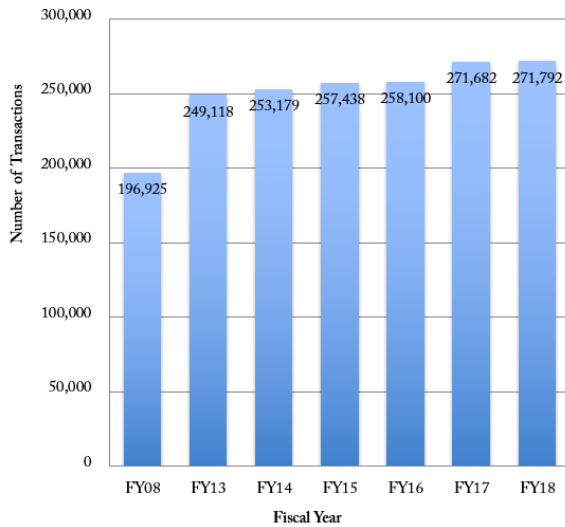


A significant percentage of the Harvard population owns a library card, which continues to be a positive reflection of the role the library plays as part of the Harvard community. Additionally, despite the significant increase in electronic traffic, the number of transactions and traffic at the front desk held steady and even increased slightly over the study period.

### Library Cards vs Harvard Population



### Total Circulation Desk Transactions: Check-outs, Check-ins, Holds, Renewals, Transfers



Audio book circulation has grown slightly, to over 11,000; note that the percentage of audio downloads, as opposed to physical borrowing of CD's, has increased dramatically from just under 1,200 in 2014 to over 6,500 in 2018. However, over 4,500 audio books on CD were taken out in 2018, so they are still a valuable part of the library's offerings. Both young adult and adult programs, many of them sponsored by other town organizations\* and held without charge in Volunteers Hall, have remained popular; attendance at the YA programs has been climbing steadily, with 518 students coming to library

programs in 2018. Adult programs had their highest attendance in 2018, with almost 3,300 participating. And attendance for children’s programs has grown steadily, from about 6,600 in 2014 to almost 8,000 in 2018.

### **Statement of ADA Compliance/HPL Accessibility**

The Harvard Public Library is committed to making library services accessible for all our patrons. The new building, completed in 2007, is ADA compliant. Compliance is recognized by the occupancy permit granted April 2007.

- There are two designated ADA parking spaces.
- Entry and exit doors to library are equipped with automatic openers.
- An elevator reaches all levels of the library.
- All restrooms are ADA compliant with automatic, motion-activated lighting, flushing, and water faucets.
- All service desks are designed to meet ADA functionality for both staff and patrons.
- The library has a Topaz Low Vision Magnifier (desktop unit) located in the ground floor Harris Local History Room for use in the library to assist people with visual impairments.
- HPL has a collection of large-print books, offers Reader’s Digest Large Print Edition, has a hand-held magnifier available at the Reference Desk, and offers a broad collection of audiobooks for people with visual impairments.
- The library has headphones available for hearing assistance to patrons using computers.
- Monthly senior movie programs are presented with closed captioning.
- The library offers “Books at Home” – a delivery service for homebound patrons.

### **Funding**

The library has been funded to the full certification level every year to date.

Annual funding for the library’s operating expenses come from the Town Budget; the FY 2019 allocation is just over \$603,000. Town- held trust funds for the library provide approximately \$5,000 toward the operating budget each year. The library receives between \$7,000 and \$8,000 from state aid to libraries each year (dependent upon the state revenues), which can be used as needed.

The library also receives funding for building improvements and programming from the HPL Trust, Inc. An annual appeal by the HPL Trust, Inc., provides funds of about \$7,000, which allow the library to be open on Fridays during the school year. The fundraising activities of the FOHPL provide annual funding of \$20,000 for museum passes, children’s programming, and musical programs. Additionally, recent annual grants of about \$5,000 have been used for AV resources and maker space technology.

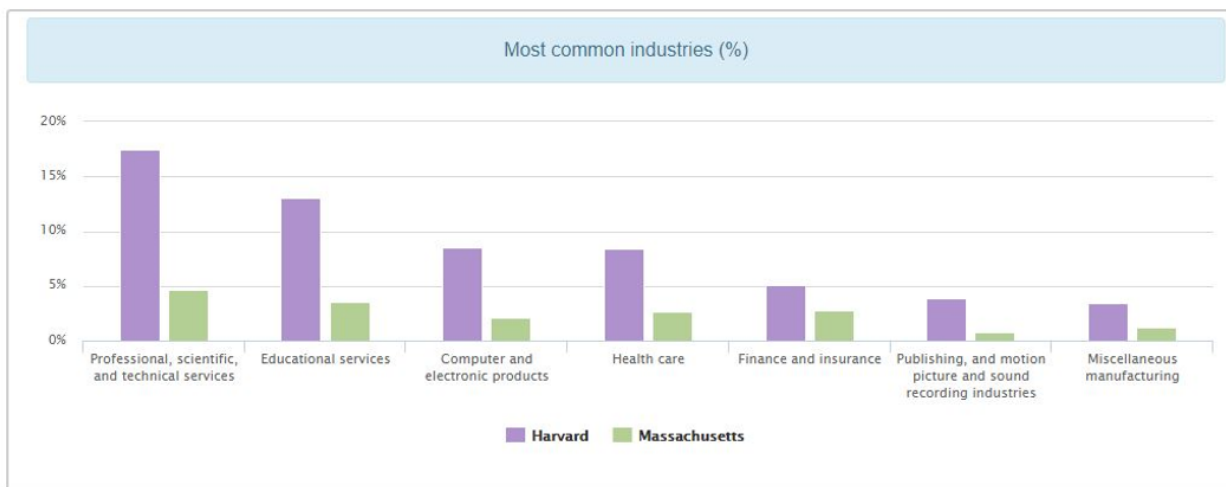
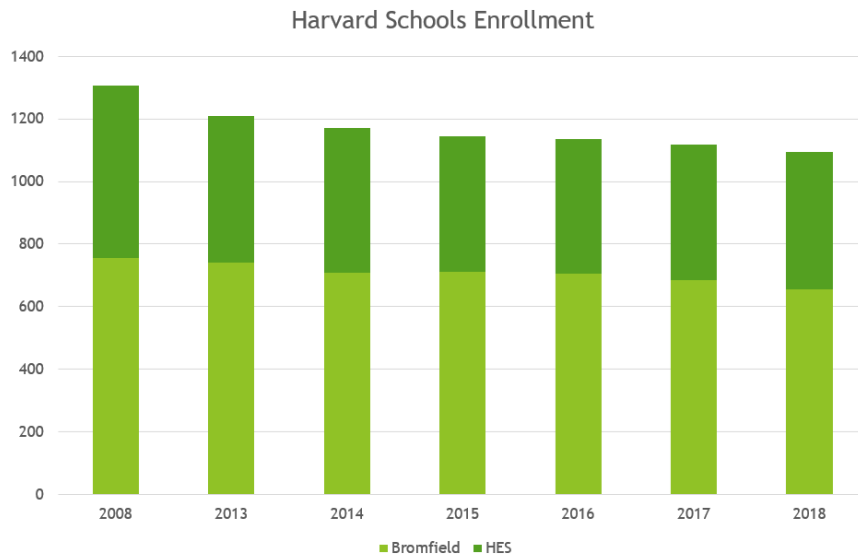
<b>FUNDING</b>		
	<b>FY 2018</b>	<b>FY 2019</b>
Total Town Expenditures	\$ 24,377,028	\$ 25,852,853
Total Town Library Expenditures	\$575,537	\$603,028
Library Percent of Total	2.36 %	2.33%
Annual Library Per Capita Expenditure	\$95.92	\$100.00
Daily Cost Per Capita	26.2 cents	28 cents

After-school attendance now reflects students coming to the library for serious work. The student activity problem raised in the last 5-year plan has been solved via a code of conduct, monitoring, and the General Store, which provides an alternative place for students to meet. Patrons now comment on how nice it is to have so many students using the library. Volunteers Hall, with a seating capacity of 100 people and a maximum occupancy of 165, hosts meetings of various community organizations on a regular basis.

## Team Two

The data show that the population of Harvard is holding steady, increasing by just a couple of hundred residents over the past six years. Despite the growth in the town, the student population is declining, a trend that has shown itself to be a local, state, and regional New England phenomenon since the Great Recession of 2008.

The data also show that the Harvard community is a highly educated and professional group. The majority of Harvard residents work in the following fields: professional, scientific, and technical services; educational services; computers and electronics; health care; and finance and insurance.

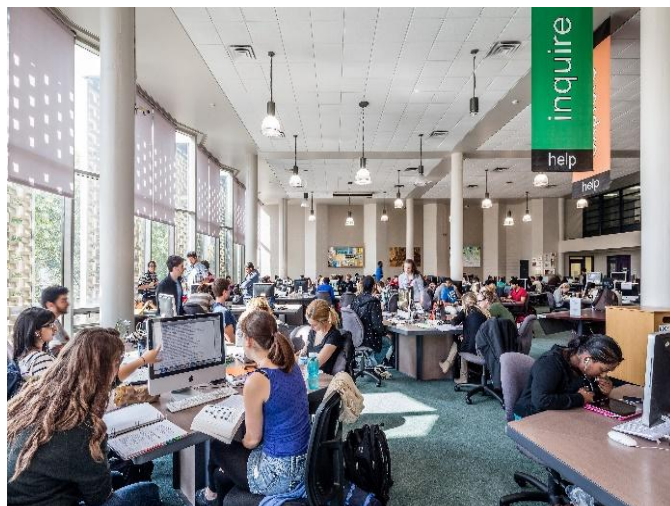


Many of these industries lend themselves to a telecommuting strategy, which helps to explain why the library staff has observed a significant increase in patrons who use the library as telecommuting workspace. Supporting this trend is the fact that half of telecommuters are 45 years of age or older, compared to just 41 percent of the overall workforce. Additionally, New England has seen a 71 percent increase in telecommuting since 2010, and Massachusetts ranks tenth in the U.S. for states with the most telecommuting jobs.

Given that the 2017 Flexible Work Arrangements survey by the International Foundation of Employee Benefit Plans show that 74 percent of employers offer telecommuting and predict an increase in its use implies that this trend is likely to increase in the library in the future. Team Two believes the library needs a strong wifi connection and more varied workspace options (private workspaces, meeting rooms, cell-phone use spaces) to support telecommuters and self-employed workers. If those needs are unaddressed, the library will miss out on providing a significant service to working-age residents.

Another trend that the group uncovered in its research is a move among public libraries to digitize their unique, locally significant physical collections. More than 37.6 percent of libraries have engaged in digitization activities in the past three years. Team Two believes that digitizing the library's unique, locally significant physical collection would increase access to its materials, engage patrons on a whole new level, and help communicate our library's value. Furthermore, if not digitized, the library could forever lose these significant local treasures if there is a natural catastrophe.

Finally, Team Two reported that there is evidence that many libraries are reevaluating space needs for 21st-century library services. The "fast casual" trend in restaurants has accustomed patrons to seek out active social spaces with lots of plugs, where they can hang out with their devices. Libraries are adopting living room-like social, flexible spaces that encourage mingling, conversation, and the forging of connections. Team Two urged the Planning Team to consider this component of strategic positioning for the Harvard Public Library's future. If the library does not provide opportunities for people to engage, it could hurt its positioning as the community hub.



## Team Three

As described earlier, initiated as part of an effort by the Trustees' Strategic Planning Team to frame major goals for library improvement, the Strategic Planning Survey was open for response for more than nine weeks – with these results tallied based on responses given through Wednesday, November 28, 2018. During this period, 400 people responded to the survey. While this summary is based on the Planning Team's interpretation, and many snapshots of what was collected are included below, all the raw data is viewable online by going to the following link:

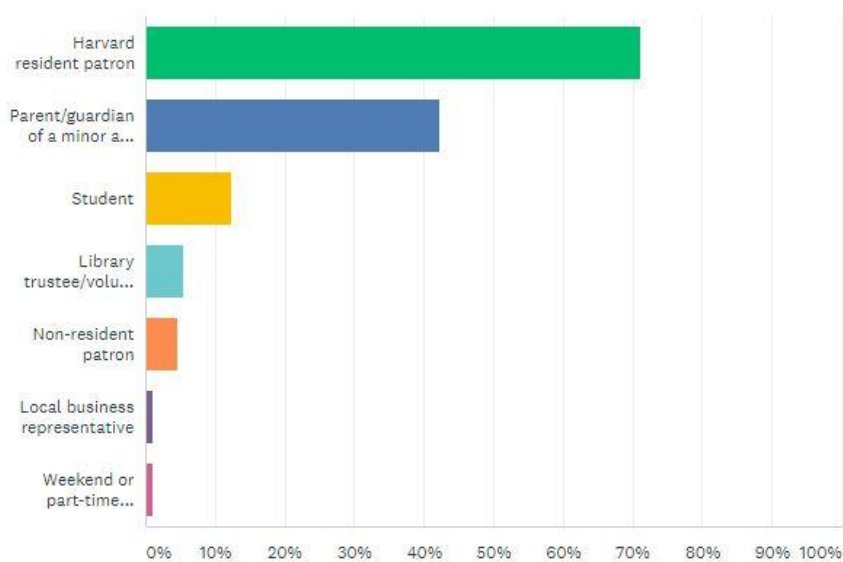
<https://www.surveymonkey.com/results/SM-DBH9M5BKV/>

While all the numerical data is viewable, there is no access to the free-response, write-in answers. In the survey materials, we promised participants that their responses would remain anonymous, and leaving them hidden from public view will keep them that way.

Of the 400 patrons who spent an average of 8 minutes taking this year's survey, the vast majority identified themselves as either parents or library patrons.

Which role(s) best describe(s) your current status (you may select as many that apply to you)?

Answered: 397 Skipped: 3

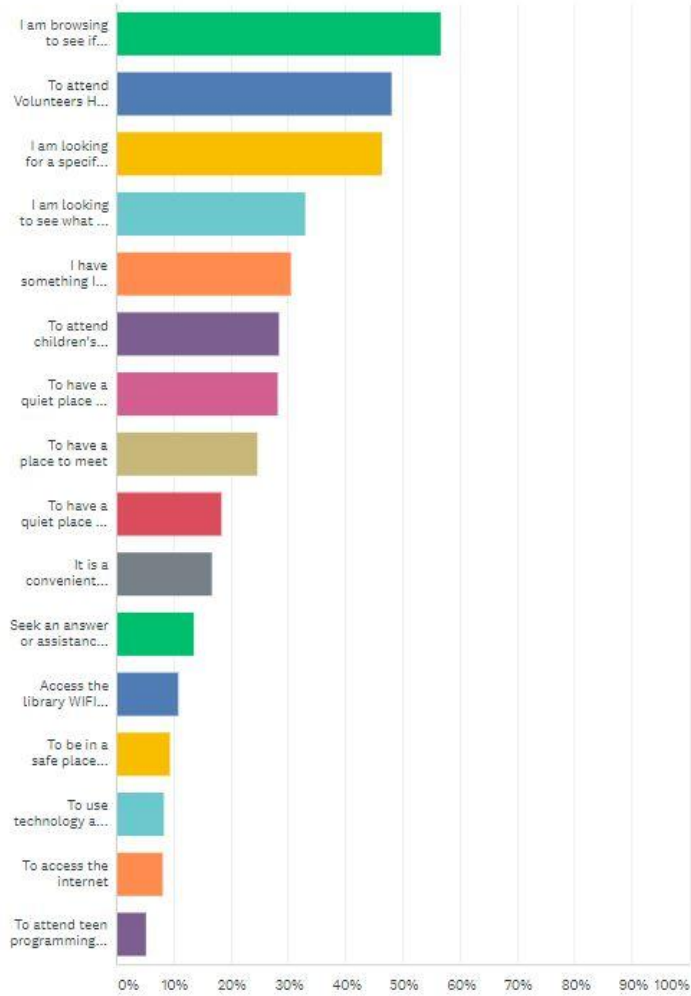




When they come to the library, patrons are interested in a wide variety of items and resources.

When you visit, which of the following best describes why you come in (you can select as many that apply to you)?

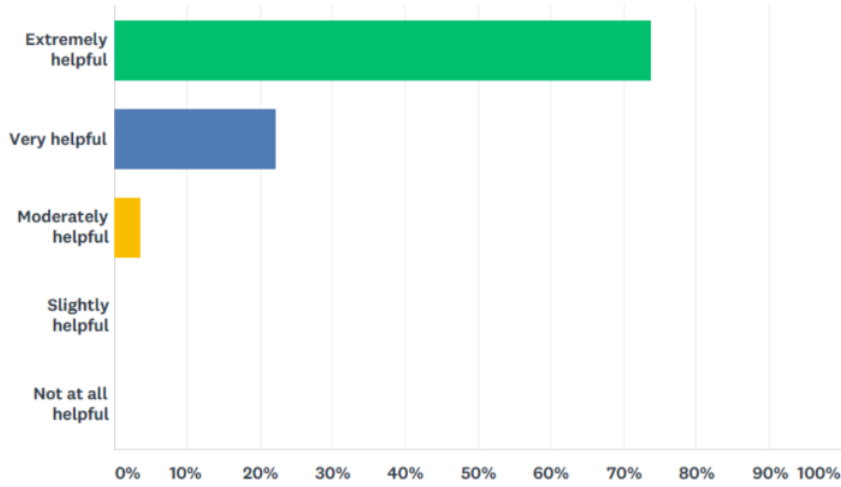
Answered: 347 Skipped: 53



And once they are there, an overwhelming number of people are very satisfied with what they find and how the staff of the library interacts with them.

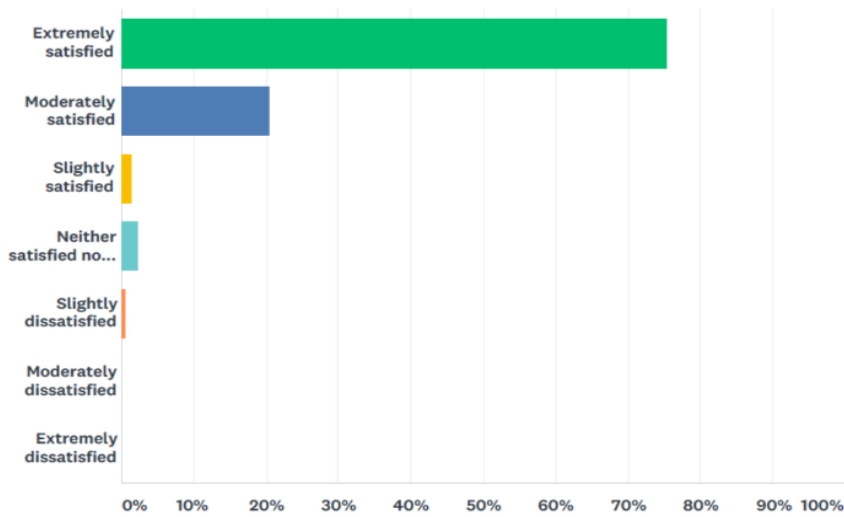
### Q11 How helpful are the staff at the Library?

Answered: 360 Skipped: 40



### Q18 Overall, how satisfied are you with the Library?

Answered: 360 Skipped: 40



## Write-In Results Summary

Approximately 50 percent of survey respondents added hundreds of written responses to the open-ended questions, and their comments largely reinforced the findings represented in the quantitative data. The “Word Cloud” to the right was generated through an analysis of word frequency and themes that appeared in totality of the responses to Question 24. The larger the word, the more prominent the collective sentiment in the patron responses.

Finally, Question 26 asked respondents to identify the most important thing they wanted the trustees to focus on to ensure the future of the library. While not all the comments reflect the strategic goals derived from these responses and from Question 25, there was a wide range of topics represented that the committee seriously considered before finalizing the goals for this 2018–2023 Strategic Plan. In general, patrons advocated for the steady stewardship of existing resources with an eye to expanding digital resources and space for various high-interest needs and activities.

### Q24 What do you like most about the Library?



## Processing the Data and Setting Priorities

As each team was presenting its data, all the members of the Strategic Planning Team were listening, viewing the information, asking questions, and recording their individual responses. As they did, they were tasked with recording all their individual insights in three areas of reflection for the library. One was kudos – or clues in the data regarding things that the library has done well over the planning period. These insights will not only allow the trustees to take note of their successes over the last six years, but also highlight potential strategies and planning actions that have worked well and could be replicated on this plan’s high leverage goals. The second area of reflection participants were asked to keep track of was questions for further study. Here, Planning Team members were on the look-out for information or issues that were raised in the presentations that they wanted to know more about. These questions could be either short- or long-term, or even rhetorical in nature. Finally, Planning Team members were asked to take note individually of things they thought of as they listened and interacted with the data that they would identify as “significant findings.” The core of the planning process led to the significant findings that then form the basis for identifying the strategic focus goals.

With the presentations complete, everyone placed the notes on each of three tables labeled Kudos, Questions, or Significant Findings. This kept them organized for the next step in the planning process. Strategic Planning Team members were randomly assigned to one of the three tables. The facilitator then led each group through an affinity diagram process wherein all the separate cards are sorted and grouped according to common themes. Cards with an “affinity for one another” are placed together. Each sorting group then rotated to another table to review each of the other groups’ work, ensuring that all participants had an opportunity to read all the individual contributions.

Once the sorting was complete, participants returned to their seats and were assigned the task of creating header cards— titles—that defined the themes from each set of affinity cards. The key in this stage is to create accurate descriptions to guide the final stage of the planning process.

### Kudos

In the first area, “Kudos,” the identified themes not only reflected the positive data collected by Teams 1–3, but also provided more evidence of the fine work done by the trustees, director, and staff over the past six years.

- Excellent staff
- Young adult program performance
- Strong data collection
- Impressive library usage
- Good job identifying/anticipating future needs
- High percentage of library cards per population

## Questions

As for questions, there were none that required resolution prior to identifying planning priorities, but rather highlighted some of the anticipated challenges of working toward any improvement goal. It did appear that any of these specific areas of inquiry could be addressed outside of the formal planning process.

- How does a building with limited space accommodate diverse patron needs?
- How can we better communicate with the community (services, interlibrary loans, events)?
- How can we best analyze/organize the data for public presentation?
- How can we change the interlibrary loan process so that Harvard books show first for Harvard residents?

## Significant Findings/Identified Goals

In the area of “Significant Findings,” six key themes emerged. Planning Team members remarked that the themes seemed to naturally flow from the presentations and represented ideas that came up repeatedly in each team’s presentation and the group discussions. Once the themes were identified, the facilitator used a nominal-group technique, a weighted voting process to separate the most critical of the findings that could then be translated into this plan’s strategic goals. After a brief discussion, each Planning Team member’s weighted votes were counted. As a result, three target areas clearly emerged; these will be the focus for the new Strategic Plan.

- Upgrade equipment, technology, and wifi capacity to serve the needs of an increasingly digital and mobile population.
- Study and plan for the reallocation/expansion of library space to meet the changing demographic and technical needs of the patrons.
- Digitize and catalogue historical collections to both preserve and provide greater access
- There were three additional themes that had support, but lesser weighting, and therefore did not meet the criteria as goals for this five-year strategic plan and will be revisited at a later date.
- Need for better communication with town residents and officials to gain support for increased funding
- Maintain equipment and training to respond to medical and safety emergencies within the building
- Explore ways to expand or re-allocate hours of operation