



## Strategic Plan 2019-2023



Photo by Kelly Bolter

# Introduction

**“The library is in the community and not just in a building.”**

*Community conversation attendee, July 9, 2018*

Every community has a story. Those who live in and love their community have hopes, see challenges, and have ideas about what to do to help the community reach its potential. As we’ve developed this strategic plan, we’ve listened to people from Waukesha to understand our community’s narrative.

We heard that residents have many hopes for our city and themselves. We heard that our community is not without its challenges. We clearly heard that there are wonderful things happening right now in our community and that there is great potential for much more, especially when we can come together, learn from each other, and work cooperatively.

**“The city has all of the elements of a big city,  
but is **accessible like a small town with the stimulation of a large city.**”**

*Community conversation attendee, July 19, 2018*

Throughout the process of gathering information from our community, people we heard from were proud to share what they see as Waukesha’s great events and assets. Following are just a few examples of what people shared:

- The arts are part of the city’s fabric—from the school district’s highly-rated music and arts program to the art crawls and local galleries, to having been named a Gibson GuitarTown thanks to the amazing innovations of Les Paul. This culture of supporting the arts also connects our community at Friday Night Live events and movies and concerts in the park.
- There are local destinations and activities that not only provide options for community members to experience, but also draw others to our city. This includes the Waukesha Janboree, local bike trails, the Riverwalk, the farmer’s market, and the Charles Z. Horwitz Planetarium and Retzer Nature Center.
- As one community conversation person said about groups working together in Waukesha, “collaborations are not by accident.” Well-regarded community collaborations include SOPHIA of Waukesha County, the Waukesha Youth Collaboration, and the Hispanic Collaborative Network.
- The city’s three academic institutions, Carroll University, Waukesha County Technical College and University of Wisconsin-Milwaukee at Waukesha are great resources and assets for the area.

With all these wonderful things going for the community, we also heard about challenges we need to be working together to address. The main issues we heard include:

- There is no real community center or space where we can come together in the community to meet, learn from each other, and collaborate.
- We have pockets of underserved groups. Transportation deserts where people with limited resources live make it hard for some to take part in the community and to access services and needed resources.
- The city has struggled with homelessness and helping those that are vulnerable in our community.

In our conversations with community members and in responses to the community-wide survey we administered, many envisioned the library as the place in Waukesha where we can both connect our community assets and address our challenges together. Our community sees the library as a place that...

- is warm and welcoming with spaces for people to come together to meet, study, create and explore.
- sponsors more community events to bring people together to work side by side to make our community even better.
- doesn't just exist inside the library building, but is in the community for those that aren't able to take advantage of all the library offers because they physically cannot get to the library.
- widely shares the great things the library is already doing for all to know about from the strong connection between the library and the Parks, Recreation and Forestry Department to the sharing of a Community Library Liaison that works for both the library and school district.
- connects the community by enhancing existing and building new partnerships that help us build on our common strengths and respect and appreciate our differences.

All that we heard and learned from the community laid the groundwork for this strategic plan. We are excited with the possibilities in front of us and we look forward to enhancing our facility and elevating our services to connect our community to each other, to ideas and opportunities, and to the joys of reading and learning.

# Strategic Plan Foundations

Our mission and vision statements give us a foundation for acting and making decisions that ensures Waukesha enjoys the best library possible.

## Mission

*Waukesha Public Library champions the power of reading and learning to enrich, empower and engage all in our community.*

## Vision

*The heart of a thriving city,  
the library connects and inspires the community to transform lives.*

## Service Values

The following service values guide our daily work and commit us to serve everyone in our community.

### **People**

We believe the library's purpose is to be used and enjoyed by the people of the Waukesha area.

### **Community**

We strengthen the community by collaborating with others, engaging in dialogue, and celebrating our history.

### **Creative discovery**

We believe in fostering new ideas, both for the library and for a thriving city.

### **Inclusivity**

We strive to equitably serve everyone in our diverse community.

### **Civility and respect**

We believe in open and polite dialogue, in intellectual freedom, and privacy for all.

### **Excellence**

We hire the best staff and work to continually improve in order to meet the changing needs of our community.

### **Accountability**

We meet our obligations and are responsible stewards of the community's investment.

### **Passion**

We know that the library transforms people's lives for the better.

# Strategic Plan Goals and Objectives

## Goal I – A World-Class Library

*Redesign the library facility to meet the need and demand for collaborative and flexible meeting and programming spaces and to improve the appeal, usability, and maintenance of the building to be more welcoming and easily navigated.*

### Objective

- By 2023 the library will have completed a redesign of the internal layout of the building to have more flexible meeting spaces, both in square footage and number, and will have implemented changes throughout the library to improve the experience of all who use the library.



### Rationale

Twenty years ago a vision for the library building was created. The promise of the vision was never fully realized and the need for a facility that better meets the ever-changing needs and demands for our spaces is now even greater.

Repeatedly during the planning process, we heard the need and desire for space improvements by those that shared their feedback.

*“Larger group meeting/event space for use by community partners.”*

*“Reserving a room would be nice for our writing group.”*

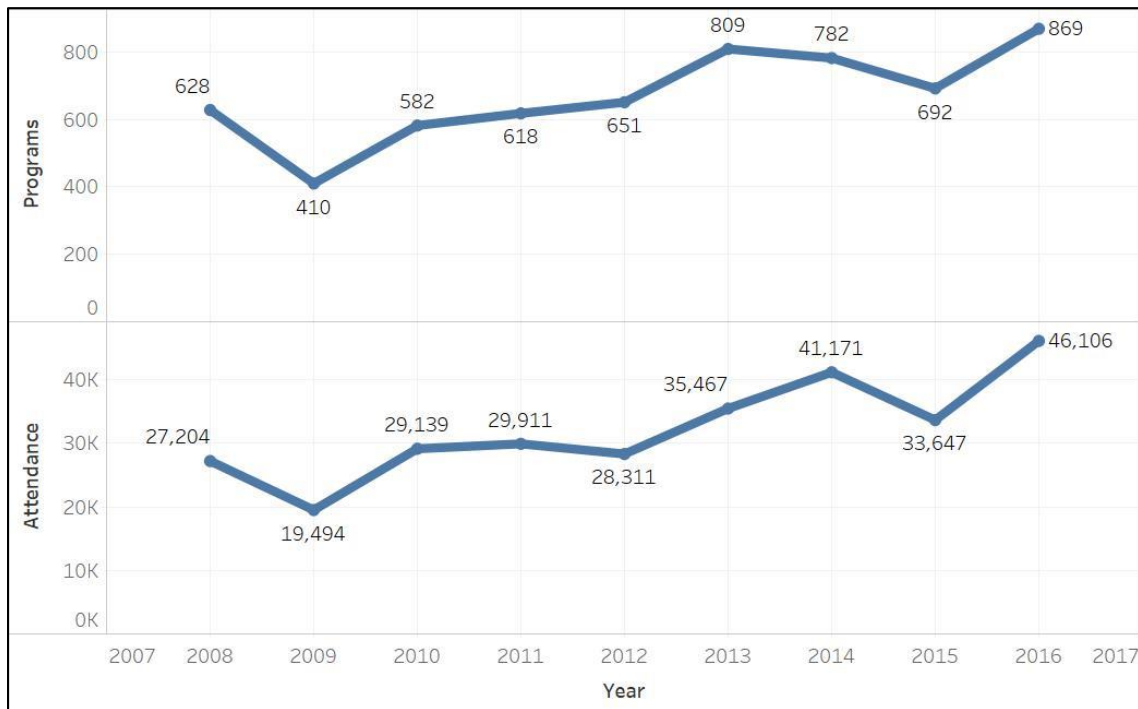
*“Better parking and better access to entrance would make the library more convenient to visit.”*

*“I wish the meeting room was bigger or had multiple rooms”*

*“Rooms the public could use for meetings (even meetings for small businesses)”*

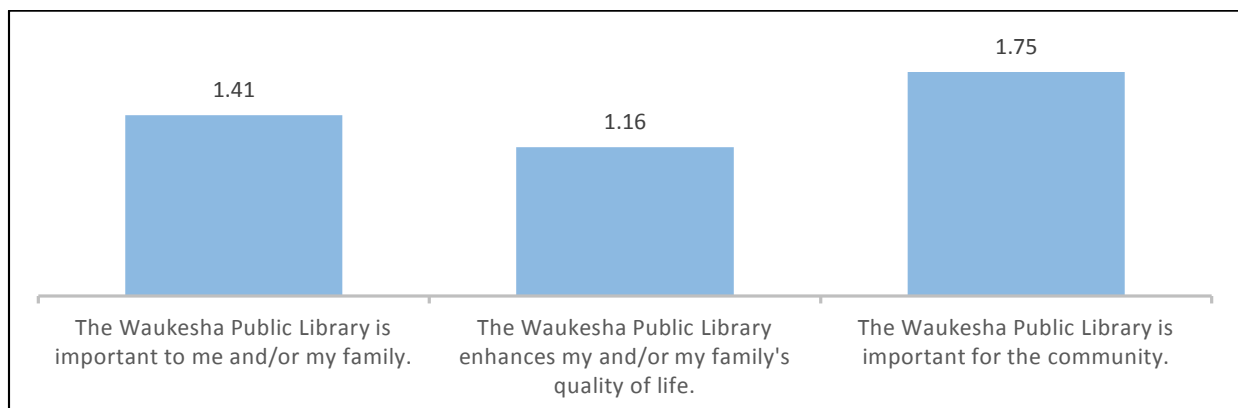
*“Makerspaces are very appealing.....having local experts, whether business owners, artists, or teachers, share their knowledge with the community through programming.”*

In 2016, the library hosted an average of 17 library programs with nearly 900 people attending each week. The increasing community desire for these learning opportunities and events can be seen by the program data between 2012 to 2016: program attendance increased at a higher rate (+63%) than did the number of actual programs offered (+33%). It is simply becoming increasingly difficult to meet the demand for our programs in the current library spaces.



The community survey we administered asked about possible improvements that could be made to the physical spaces of the library. What is most interesting in the responses, almost across the board, is that infrequent library users (used the library 6 or fewer times in the past year) indicated slightly more support than frequent users for space changes including providing more and larger meeting room space, more private/quiet areas, and spaces dedicated to collaborative work and creation.

Also enlightening was how highly the community values the library, as shared by survey respondents. It's not surprising that this would hold true with those that use the library frequently, but this is also the case for infrequent users of the library. In the survey, we asked how strongly respondents felt about some statements regarding the library with a scale where *Strongly disagree* rates as -2.0 and *Strongly agree* rates as +2.0. As you can see in the following graph, infrequent users strongly value the importance of the library for themselves and their family. Even more, though, they clearly believe the library is important to the community.



## Implementation

### Years 1 and 2

The library will focus its work in two areas during the first year of the strategic plan.

1. Make initial improvements that can happen before a more extensive redesign is complete. This includes such activities as reviewing the different sections of the collection, both its size and location in the library to allow different uses and relocating public information space to increase visibility.
2. Create a vision for the library facility spaces. This will include potentially working with a consultant to identify a design that makes better use of library spaces to meet our needs and demand. As part of this, the goal is to improve the experience of those using and navigating the library.

### Years 3 to 5

Implement a facility redesign that will solve the issue of inadequate meeting room space, improve first floor navigation, provide flexible spaces for collaboration and creations, and address concerns and issues with the entryway.

## Goal II – A Community-Supported Resource

*Ensure short and long-term fiscal sustainability through continuous exploration of funding opportunities and sources to meet and support the ever-evolving service needs of our community.*

### Objectives

- Solidify ongoing support of Friends of WPL and enhance existing efforts to identify new opportunities for other funding sources, including grants, to support programming, innovative service development and purchasing needed resources.
- Establish fundraising initiatives to support higher-cost investments into the library and provide long-term funding support to allow the library to meet its mission and reach its vision.



### Rationale

*“I love the library; you exceed my needs.” - Survey respondent, June 2018*

The library is well-loved by our community. We know this by the smiles our staff see every day when they help a patron and with all the kind words we hear about the library throughout the year. Serving a



community the size of Waukesha is both an honor and responsibility. It also requires support that allows us to best meet the expectations and needs the public has for the library.

City and County support of the library has been critical to our success and ability to serve the community and will continue to be crucial as we work to help our community reach its potential. Beyond county and municipal support, there are opportunities we can explore to further stabilize support of our fiscal needs and allow us to reach to do more for those we serve. This includes identifying possibilities for private-public partnerships, seeking grants, and other avenues.

## Implementation

### Year 1

During the first year of the plan we will focus on three efforts to support fiscal needs to reach our vision for library spaces and services.

1. Increase awareness of the Friends of Waukesha Public Library membership, events and activities. The Friends group has been a key partner in our efforts to do more and create wonderful experiences and opportunities for our community.
2. Coordinate advocacy and marketing efforts related to fundraising to implement a vision for redesigned library spaces. The library will explore a Library Foundation and other options for a community-supported effort to improve our library facility to become the heart of the community we envision it can be.
3. Allow for library donations to be made online.

### Years 2 through 5

Three of the opportunities we'll explore starting in year two to supplement our funding to help us provide excellent services include building grant writing skills and capacity within our organization, identifying grant opportunities for targeted projects, and enhancing our general library advocacy.

## Goal III – A Library for Everyone

*Establish the library as the community hub that connects information, ideas, people, and partners to opportunities, resources, services, and spaces that are innovative, accessible, inclusive, and equitable.*

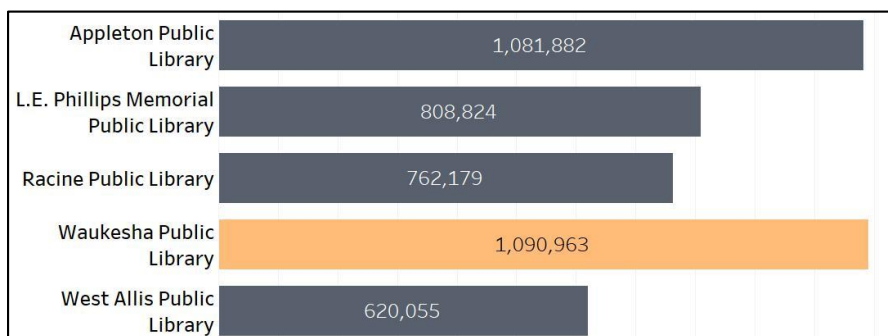
### Objectives

- Increase inclusivity and access to service and resources removing unnecessary barriers and facilitating positive interactions between staff and patrons with the results being an improvement in patron satisfaction and an increase use of space, collections, and services.
- Align services and resources with the needs of the community
- Instill organizational expectations to provide the best service to the entire community.



## Rationale

The library usage information we reviewed during this process shines a light on the current community needs for our services and resources. While circulation patterns have changed over the last 10 years, our community still highly values the collections available at the library as seen in our library's circulation totals compared to similarly sized libraries in the state.



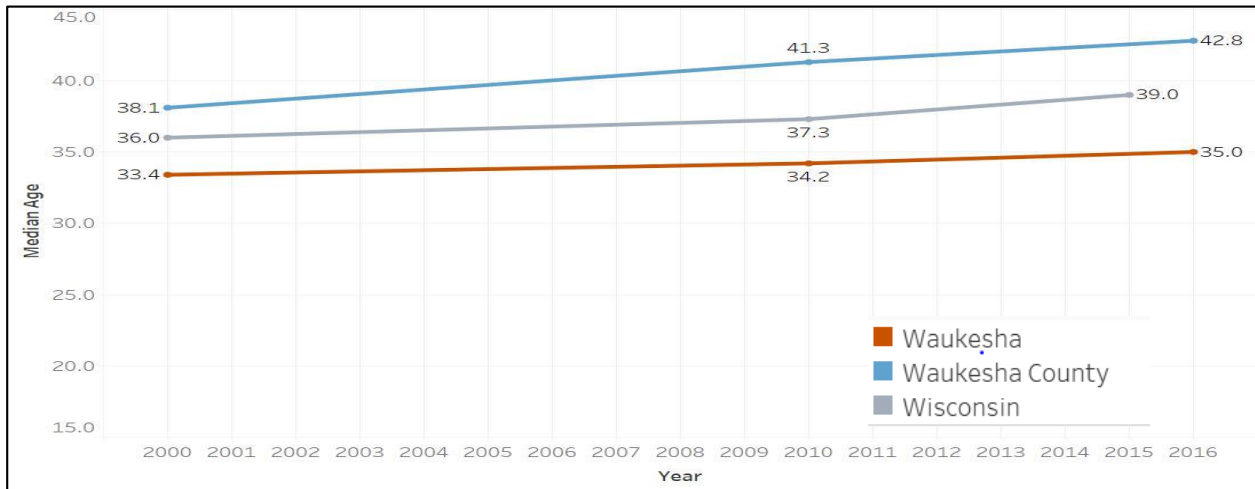
As library users continue to utilize our collections, there are other ways people are using our services and programs. We are used more and more as a resource to assist people with technology. This ranges from coming to the library for internet access either through our Wi-Fi or library computers to assisting patrons with downloading e-books onto their reading devices to helping a person set up an email account to be able to apply for employment.



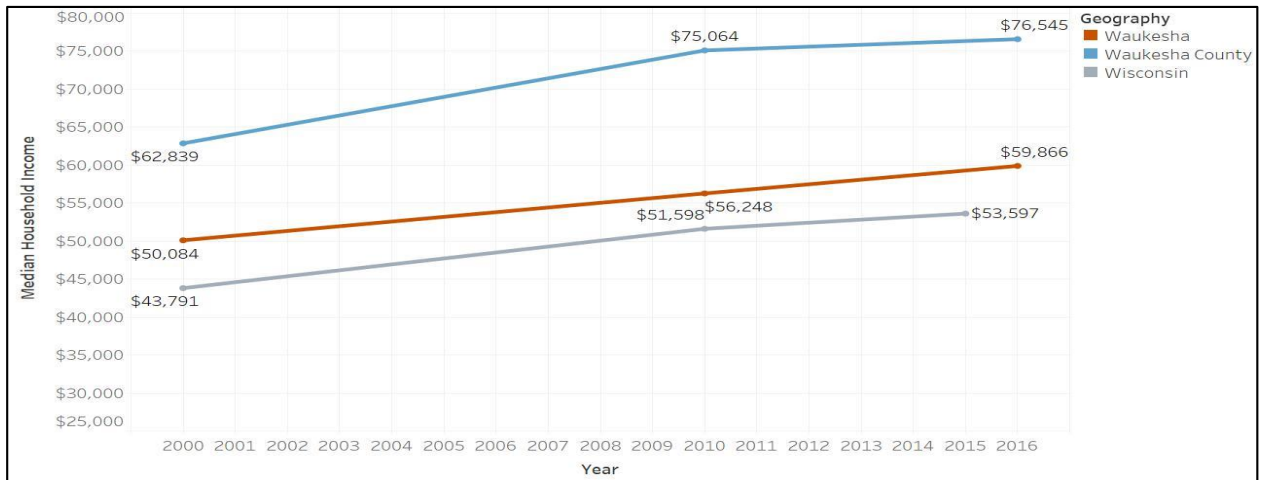
Also, as was demonstrated in the first goal with the growth we experienced in attendance at our programs, we are a community that is eager to learn by connecting to each other and attending programs the library offers. This growth in usage informs us that we can do even better providing learning opportunities, including making programs like Waukesha Reads even more successful. Respondents to our community survey—both infrequent users and frequent users—told us that having programs that were of interest to them and their families would increase their usage of the library.

With the success we've had providing our services and making our resources available, we know there is more we can do to meet our evolving community needs and desires. We need to ensure we are reaching out to all to understand their needs, especially those that are currently underserved. In addition, we need to develop and target community specific programs, collections and resources to attract new users. The following four graphs show that the city of Waukesha has a different demographic makeup than the rest of Waukesha County.

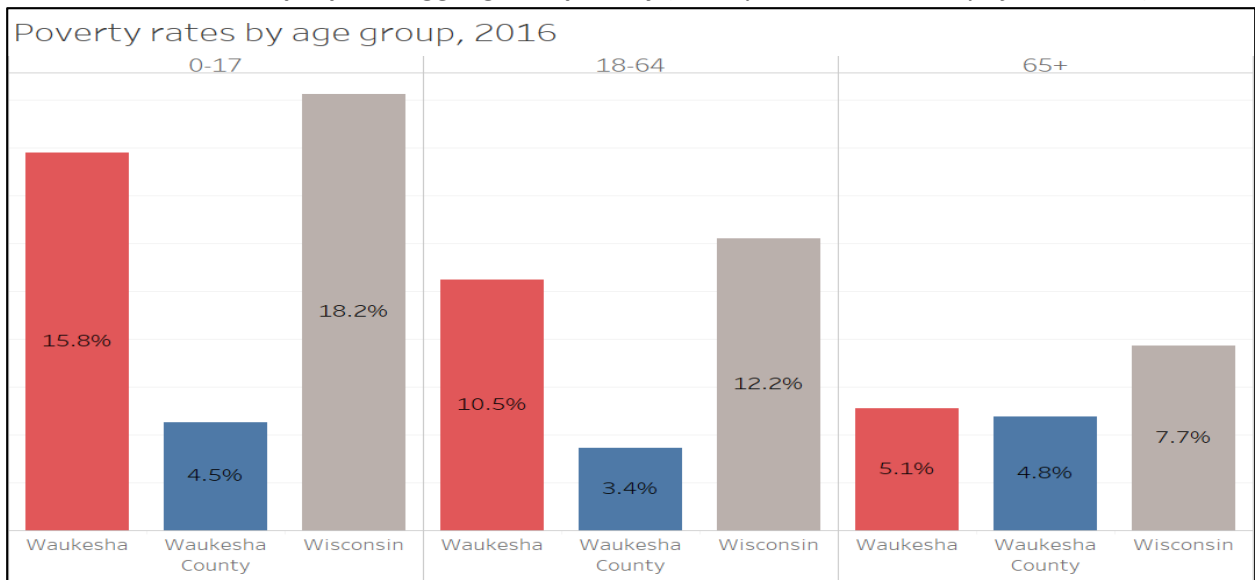
***We are younger with a higher population between ages 20-44 (County total includes City of Waukesha)***



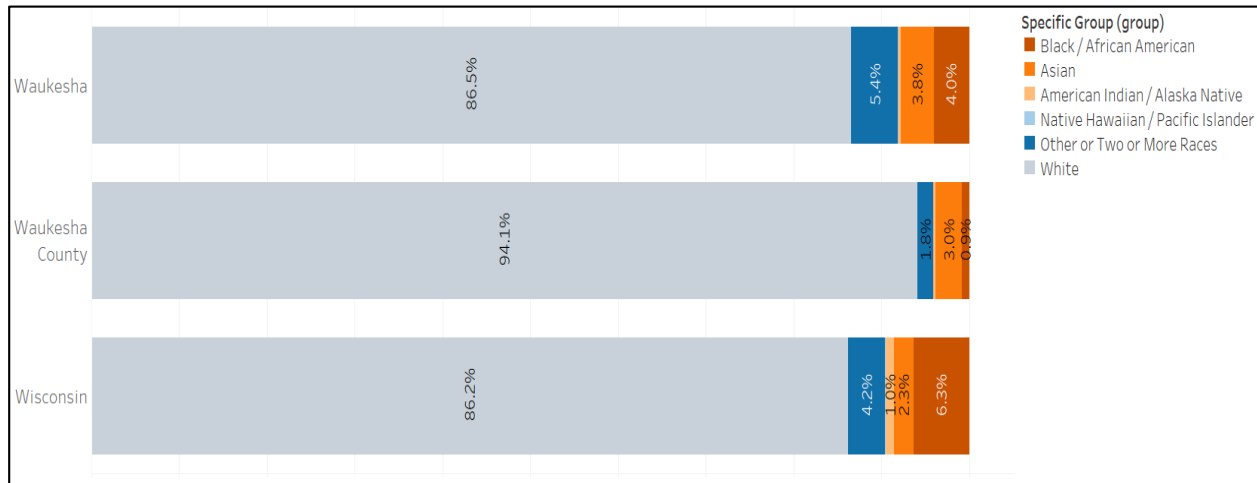
***Our median household income is lower (County total includes City of Waukesha)***



***We have more people struggling with poverty (County total excludes City of Waukesha)***



***We are more diverse (County total excludes City of Waukesha)***



The following table specifically shines a light on our city's evolving demographics compared to the rest of Waukesha County in relation to the population of members of our community whose ethnicity is Hispanic or Latino.

	Total Population (2017 U.S. Census Estimate)	Hispanic or Latino Total Population	Hispanic or Latino Percentage of Total Population
City of Waukesha	72,489	8,626	11.9%
Waukesha County (excludes City of Waukesha)	328,132	10,604	3.2%

Understanding the makeup of our community allows us to best design our services so they are accessible and inclusive to all. We see it as our obligation to be reflective of our community and will pursue opportunities to ensure we are a library for everyone.

## Implementation

### Year 1

Earlier in 2018, the library formed an Equity, Diversity and Inclusion (EDI) Committee. The work of this committee will be vital in our efforts to better serve all residents. This effort, along with others we will develop, supports the development of programs that are more representative of the entire community, and develop and implement more patron-centric policies.

To support staff needs and education to achieve this goal, we will provide equity, diversity, and inclusion training and work to reflect our community's population in our staff.

Finally, we will improve technology support to meet the needs and questions of the community by exploring one-to-one technology help, partnerships, training for staff to answer questions confidently,

updating hardware and software to improve patron experience, and offering/trying digital inclusion programming.

#### Year 2 through 5

In year two and beyond, we will seek to expand our outreach efforts, including working with community groups, civic organizations and others to find new ways we can bring library resources into the community. We will explore transportation partnerships to reduce this barrier to accessing the library. We will examine our open hours to ensure we are best meeting the community's needs within our capacity and resources. Finally, based on the needs we identify, we will work to find and implement solutions to improve our support to meet the community's technology needs.

### Goal IV – A Culture of Excellence

*Support our staff with tools, innovations, professional development, and leadership that creates an atmosphere where all strive to exceed expectations and respond to and respect all patrons and their evolving needs.*

#### Objectives

- Develop a comprehensive system that supports professional development and growth.
- Develop a technology plan to bring the library's technology to a level that is highly available, sustainable, innovative, and meets customer—both staff and public—needs.
- Implement ongoing process improvement and increased internal coordination to make staff communication, workflow, and customer satisfaction more effective and efficient.

#### Rationale

*"We are blessed with a great library & staff!!!" - Survey respondent, June 2018*

The expectations of knowledge and expertise from library staff by our patrons continue to grow every year. In May of 2018, eighteen staff members participated in a session that asked them to share their thoughts and ideas related to the library's strengths, weaknesses, opportunities and challenges. The staff shared their concerns, ideas, and aspirations about what they believe is the potential for both the library and the staff that passionately serve Waukesha residents. The following is a summary of what was shared by staff.

- Continuing education opportunities along with use of the city's performance evaluation initiative can help staff grow to better serve patrons and increase the utilization of staff talents.
- Technology rapidly changes and quickly becomes obsolete. This includes technology needed to support the staff's work and the technology available to patrons that the staff supports. The staff identified gaps and deficits that, if addressed, provide an opportunity to improve the staff's ability to serve patrons and be more efficient in their work.

- The staff can do more and better with increased communication and coordination throughout and between library departments.

## Implementation

### Year 1

The first year will include the following activities:

- Prioritize staff continuing education and ongoing learning and conversations around the learning opportunities.
- Develop a system to share, evaluate, and use (when applicable) information from learning opportunities.
- Continue implementation of the staff evaluation program.
- Develop a technology plan to get to and remain at the highest level possible
- Study and evaluate departmental procedures in order to develop and implement increased efficiencies with a goal of improved customer service.

### Year 2 through 5

Starting in the second year, the focus will be on improving internal communication and coordination.

The activities for this effort will include:

- Creating a unified customer service training program across departments, including developing and communicating consistent procedures.
- Implementing a regular review of practices for each department and developing internal assessments.
- Facilitating staff feedback and instilling the understanding that feedback from staff is welcome and necessary

## Goal V – An Increased Awareness of All We Do and Offer

*Create clear and consistent messaging and branding that communicates the library's vision and goals and promotes library resources, services, and programs through communications designed to reach all community members.*

### Objective

- Develop a marketing plan supported with adequate funding.

### Rationale

The use of our library and the demand for our services indicates that many in the community know about the library and its offerings. However, the information shared by survey respondents shows that the level of awareness of all we provide to the community varies greatly, with even our most frequent users not knowing about all that we offer.

We also learned from survey respondents that most of the ways they find out information about the library requires them to be seeking the information from our website, signage and newsletter. However, in the same question that asked about how they learn about library happenings, respondents indicate only 21% of them learned about library activities through social media, 17% from the newspaper and 16% via email. This shows there are opportunities, through the implementation of a marketing plan, to be more strategic and focused in our marketing efforts to ensure the word gets out to all in our community about the services, programs and resources available to them at the library.

## Implementation

### Year 1

The first year will include research and development to best understand what elements should be included in a marketing plan for the library. This includes exploring creative solutions for marketing and design assistance and expertise, investigating how similar libraries are accomplishing marketing and branding, and determining resources the library has and will need to accomplish its marketing goals.

### Year 2 through 5

The library will create and implement the marketing plan in the following years. A few of the desired results of implementing the plan include strengthening the brand identity of Waukesha Public Library, identifying specific audiences to increase awareness and use of the library, an improved design of the website, and consistent messaging from the library to the community and among our staff.

# Ongoing Planning

## Assessment and Communication

The Waukesha Public Library Director and staff will work in conjunction with the Library Board of Trustees to prioritize, identify service goals, and coordinate activities from this plan. The library will consider available resources, including funding and staff time; changing conditions locally, regionally and statewide; and opportunities that arise to innovate during the implementation of the plan.

The ongoing planning process for the library will include project management, assessment, communication and re-prioritization activities to ensure the goals of the plan are realized with flexibility to adapt as needed. The library will follow the following annual process and schedule to implement the strategic plan.

**March and September** – The library director, in consultation with staff, provides a verbal report to the Library Board’s Planning & Policy committee, assessing progress implementing plan activities.

**June** –The Library Director, in consultation with staff, provides a verbal report to the Library Board’s Planning & Policy committee, assessing progress implementing plan activities. The committee, working with the director, will determine if adjustments to the plan are needed based on changing conditions or new challenges and opportunities, and will identify activities that will be the focus of the library’s efforts in the following year. The decisions of this committee will be reflected in the library’s budget planning process and reported to the board as the budget is developed.

**December** – The library director, with input from staff, prepares a written update for the board, summarizing the prior year’s work and identifying activities slated for the upcoming year.



# Strategic Planning Process Background

The Waukesha Public Library Board formed a Strategic Planning Committee composed of library staff, Friends of the Waukesha Public Library members, and Library Board trustees. Under the direction and guidance of strategic planning consultants, a number of sources of data and information was gathered and analyzed between April and July of 2018. The following data and information formed the bedrock upon which the goals and objectives of the strategic plan were built.

- Annual library operations and service data submitted to the Department of Public Instruction (DPI) for the years 2008-2016.
- Results of a survey of the community conducted between June 4, 2018 and July 16, 2018 that garnered a total of 1,212 responses.
- Information from three Community Conversations attended by business and civic leaders, educators, officeholders, citizens and library patrons.
  - The first was held July 9, 2018 with nine participants.
  - The second was held July 12, 2018 with seven participants.
  - The third took place July 19, 2018 with sixteen participants.
- Results of a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis with a staff focus group.
- Results of an Issues and Needs Questionnaire, completed by members of the Strategic Planning Committee.
- Demographic and economic data from the American Community Survey and the 2000 and 2010 US Census.

The Strategic Planning Committee, with the assistance of the consultants, reviewed all the data and information and drafted the strategic plan over the course of three in-person meetings between August and October of 2018.

## Acknowledgements

There are many people to thank that gave their time to share their thoughts, ideas and hopes for the library. First, we want to thank all the nearly 1,300 community members that responded to our community survey or attended one of our community conversations. The number one focus of our process to develop a strategic plan has been to engage residents to ensure our services, programs and resources align with the needs of the community. The information we gathered from the community has been invaluable.

Next, we heard loud and clear from the community that we have amazing staff working at the library. We absolutely agree! We would like to thank all the staff for encouraging people to take our survey and those that shared their knowledge, experience, and ideas as part of the SWOT session. We would like to particularly thanks to those staff that gave their time and energy as part of the Strategic Planning Committee.

The library director is grateful for the time and passion of the Strategic Planning Committee. Their commitment and thoughtfulness was instrumental in the development of this plan. And, the Planning Committee members extend their appreciation to library board for supporting the strategic planning process.

**2018 Strategic Planning Committee**

- Bruce Gay – Waukesha Public Library, Director
- Amy Riebel – Waukesha Public Library Board of Trustees President
- Paul Kasprovicz – Waukesha Public Library Board of Trustees Vice President
- Jeff Fowle – Waukesha Public Library Board of Trustees Secretary
- Carol Lombardi – Waukesha Public Library Board of Trustees
- Larry Nelson – Friends of Waukesha Public Library Board Vice President
- John Klima – Waukesha Public Library, Assistant Director
- Kori Hall – Waukesha Public Library, Head of Program Development & Community Engagement
- Therese Lyons, – Waukesha Public Library, Head of Circulation
- Joan Quinlan – Waukesha Public Library, Special Projects Coordinator
- Paula Mason – Waukesha Public Library, Adult Reference Librarian

**2017-18 Library Board of Trustees**

- Amy Riebel – President, Superintendent's Designee
- Paul Kasprovicz – Vice President
- Jeff Fowle – Secretary
- Erik Helgestad – Common Council Representative
- Melisa Baxter – Waukesha County Designee
- Martha Ryan – Waukesha County Designee
- Cynthia Deatrick
- Kevin Guilfooy
- Carol Lombardi
- Sandra Ammerman
- Rose Sura

Finally, the library thanks Melissa McLimans and Bruce Smith from WiLS (Wisconsin Library Services) for providing planning process management and facilitation services.

## Appendix A

### Community Conversations

#### July 9, 2018, 9 Attendees

##### Themes

- Most attendees were familiar with and used many services the library offers, from print books, ebooks, meeting rooms to reference materials, although the frequency of use varied.
- Downtown Waukesha is becoming more vibrant, with more restaurants, shops, and cafes serving the community, and with more housing in the area as a driver to the services.
- There are perception problems related to parking and safety in downtown Waukesha with impact businesses and the library.
- Waukesha is diverse but segregated and there are populations that are stigmatized, including by schools, churches, and even the library. Lack of public transportation exacerbates the problem and there are people that cannot take part in the community because of transportation deserts.
- Makerspaces were very appealing, from digitization kits to having local experts, whether business owners, artists, or teachers, share their knowledge with the community through programming.

#### July 12, 2018, 7 Attendees

##### Themes

- The attendees were familiar with the Waukesha public library and frequent users, particularly of print books and programming.
- Many visited downtown Waukesha regularly but hoped that more businesses would be attracted to (and stay) downtown. Although there are many things to do like the Riverwalk, the Farmer's Market, and Art Crawls, the word hasn't gotten out. There are perception problems about the ease in navigating around the city and the attractions. Waukesha needs more events to attract people, not less, and better marketing.
- Waukesha is a welcoming place but there is a need for education to raise overall awareness of the homeless and special needs populations.
- Focus more on multicultural awareness through programming and the collection.
- The library needs more meeting space and more programming.
- The artwork is great. Build upon that and make the first floor more functional and more aesthetically pleasing.
- The Adult programming is generally good but more programs that attract different groups would be welcomed. More programs for Teens and Children would also be welcomed.
- Reconsider the library policies and educate staff to try and work with people so that resolutions can be found.
- Consider eliminating children's fines.

**July 19, 2018, 16 Attendees**

Themes

- Most of the attendees have been in the community for years and either use the library or have been involved with the library in some capacity (Board member, Friends Board member, community partner, etc.)
- Newer members of the community recognize the value that the library brings to the community
- Get the word out about what the library offers – hire a PR firm
- Highlight the Friends group and what they do to help the library
- Traditional materials are important, but engage younger people and families through social media
- The library needs to address the issues of homelessness and diversity
- Enlarge the community room
- Community connections are important; work on strengthening partnerships and building new ones
- Offer intergenerational programming
- Offer a series of programs on career development (for high school students as well)
- The Library should do more outreach in the community
- The Library should be a resource and information hub for all non-profits.
- Waukesha is a small town but offers many of the things that bigger cities offer (music and art scenes)
- Involve teens in how we can make the library better
- Have ongoing community conversations