



Wilton Library

STRATEGIC PLAN 2023-2026

January 2023

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Acknowledgements



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We appreciate the many community colleagues and library supporters who participated in confidential one-on-one interviews, and groups who participated in a series of roundtable conversations that explored themes drawn from our research – namely parents of young children, professionals who work with teens, older adults, and library staff. Colleagues from the Philip Roth Personal Library at Newark Library and the New York Public Library for the Performing Arts were helpful informants as were the directors of the Ridgefield and Westport libraries, which we visited.

Staff deserve many thanks for their diligence in developing detailed tactical plans for the implementation of this Strategic Plan giving us great confidence in Wilton Library’s ability to deliver on its promise.

Plan A Advisors is particularly grateful to Caroline Mandler and Mike Sutka for the collaborative and productive nature of this engagement which made the process a generative one and the product stronger. We are eager to watch your success and available to offer guidance during this exciting and critical period in the organization’s development.

A handwritten signature in black ink that reads 'Adam Gaynor'.

Adam Gaynor, Ph.D.

Plan A Advisors

A handwritten signature in black ink that reads 'Evan Kingsley'.

Evan Kingsley

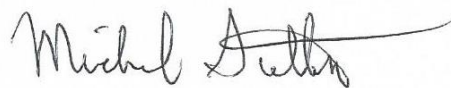
Change is now a constant...and with change comes opportunity and the need to look forward. Wilton Library's 2023- 2026 Strategic Plan has been thoughtfully crafted and adopted to address the shared needs of the Wilton community. This approach was developed with an openness to change, a forward-looking philosophy, and an intentional examination of who we serve, what we do well, what we could do better, and what we can be.

We began this process in 2022 by recognizing the excitement and benefits that change and growth has brought to the Town of Wilton. We reached out to a cross section of the community, including residents, business owners and Town leaders to solicit feedback both on the Library specifically, and Wilton itself. We also reexamined and reaffirmed our mission: To serve as the cultural and intellectual center of Wilton, and to inform, enrich, connect, and inspire our community.

Change also brings possibility. The ongoing evolution of the Town of Wilton has created great opportunity for our Library to continue to lead and be a true community center for the Town. Our Strategic Plan, therefore, is dynamic and allows for flexibility in responding to the inevitable social, economic and political forces and cycles. We must be prepared to listen and adapt to meet the ever-evolving needs of our community.

The cornerstones of our Strategic Plan were thoroughly discussed and vetted. Strengthen the position of the Library at Wilton's Center through outreach, dialogue and re-evaluation of space. Better meet the evolving needs of our **Core Constituents** through enhanced programming for every stage of life and by building mutually beneficial relationships with businesses. Leverage the privilege of hosting **The Brubeck Collection** and activate it as a platform for arts and education. **Enhance the Capabilities** of the Library to set a path for the future by ensuring funding is in place to invest in not only our ongoing services, collections and programs, but also in people, systems, technology, and infrastructure. Collectively, these cornerstones will yield a material benefit to the Town and community.

The success of our Strategic Plan will depend on the continued commitment of the Library staff, Board, patrons, community partners and generous donors. Together, we will capitalize on what the Library has to offer, continue constructive dialogue, grow our volunteer base, and support our community asset financially. Collaboration, engagement and mutual respect will underscore all we do and make our Strategic Plan a success.

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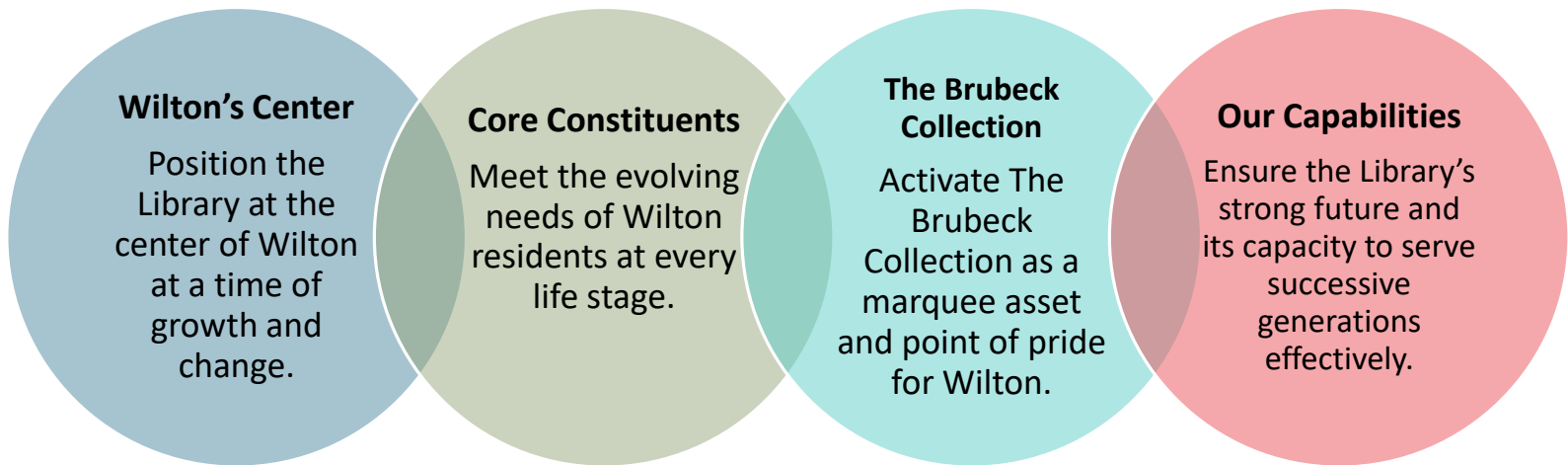
Mike Sutka, Committee Chair

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Caroline Mandler, Executive Director

Mission: We are the cultural and intellectual center of Wilton. We inform, enrich, connect, and inspire our community.

Vision: Wilton Library will fulfill the diverse needs of our changing community by providing informative programs, comprehensive resources, innovative technology, stellar services, and access to our unique assets, with plentiful opportunities to explore, learn, and create in an environment where *everyone* is made to feel safe and welcome. We will hold ourselves to the highest ethical standards and measure our success by the levels of participation and satisfaction in library programs and services.



Introduction



Wilton Library's strategic planning process began with the identification of a number of research questions articulated by the Steering Committee:

- **New Directions:** What are some big ideas and opportunities that might challenge us, and that we might consider as part of the Library's future? What's the right balance to strike between traditional and new library services?
- **New Residents:** How do we reach out to and engage new residents, so they are as invested in the Library as a civic institution as those who came before? Are there barriers we need to be aware of?
- **The Brubeck Collection:** How does The Brubeck Collection change the way we operate the Library and see the future?
- **Downtown:** What role should the Library play in drawing residents to a revitalized town center?
- **Personal Journeys:** How can we help the many people who are initiating a journey of self-reinvention in a changed world?
- **Facilities:** How should our facilities be shaped to meet community needs for a new generation of users?
- **Materials:** What are future formats for library materials, and should we be collecting them?
- **Revenue:** Is it time to consider charging for certain programs to cover costs and to diversify our revenue stream?
- **Political Climate:** How does the current political climate figure in, and shifting community values?
- **Covid Impact:** How has COVID changed us, our town and its residents in ways that will have a lasting impact on the way that the Library is used and the services we deliver?
- **Virtual Interaction:** How do we remain at the center of the community in the age of Zoom, when casual interactions are fewer? What role should we play in community gathering? What is our educational mission?

To arrive at answers to these questions and more, Plan A Advisors, staff, and the Strategic Planning Committee undertook a number of research exercises including:

- Review of programmatic, patron, marketing, financial and governance data
- Confidential interviews (22) with Board and staff members, town officials, supporters and partners
- Confidential roundtable conversations (4) with groups of constituents
- A peer scan to evaluate the competitive landscape

Planning Process & Research Findings



Planning Process



July 2022 – January 2023

The planning process was guided by a Strategic Planning Committee comprised of Board, community and staff members who played an active role throughout, selecting research participants, responding to the research and informing the direction that the entire plan has taken.

A review of Wilton Library materials, community information, comparative library data and development data provided background.

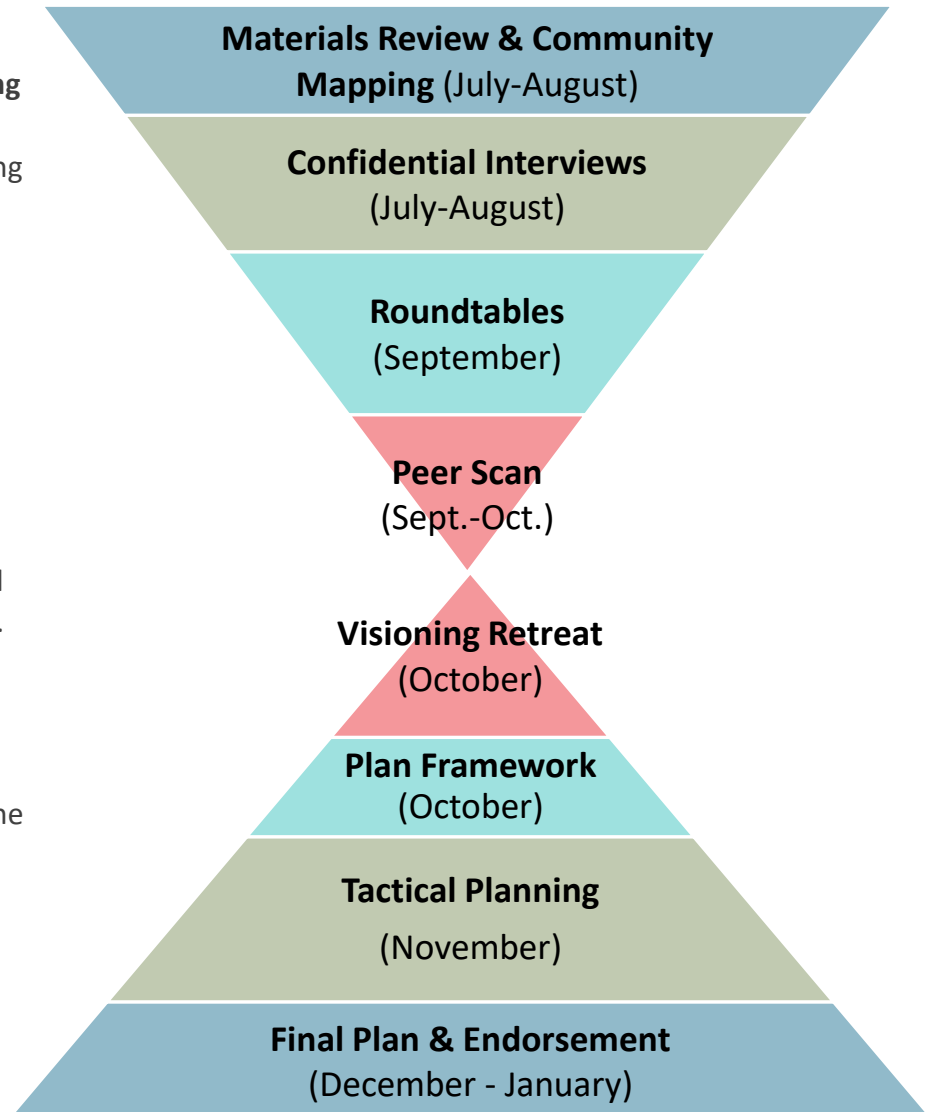
Confidential interviews were conducted with representative Board members, senior staff, community and civic leaders.

Roundtable conversations with constituent groups and staff added important perspective on community needs.

A peer scan highlighted enviable practices at other leading libraries and archives.

The visioning retreat brought Board members and all staff members together to develop a vision and refine the strategic plan framework.

Training and coaching sessions with staff helped them develop tactical plans for each strategic plan objective.



Major Research Themes



Plan A's interviews surfaced a number of major themes, summarized below. This plan seeks to address the findings highlighted here along with the rest of our research through the goals and objectives detailed later in this report.

Catalog of Strengths. Wiltonians appreciate their library, admire its staff, embrace its central role in serving the breadth of the community, and believe it can do even more to foster human connection.

Population. Wilton's population is evolving in ways both seen (many newcomers) and unseen (unmet needs). Its racial composition is dramatically different today; it has a growing number of older adults who are aging-in-place; and its veneer of wealth belies some pockets of struggle.

Brewing Tensions. The Library is hardly immune to brewing political and social tensions across America today. Navigating those tensions and playing a positive but objective role in ameliorating them is one suggested role.

Wilton Center. Significant public and private investment in Wilton's center has implications for the Library – which is seen as the area's central civic asset and local resource.

Areas of Opportunity. The Library is generally praised for being a bit of ‘everything for everyone’ but several areas of opportunity are seen as ripe for further development, in part through partnership with other entities: Arts Programming and Older Adults.

The Brubeck Collection. Highlighted by only a handful of interviewees, The Brubeck Collection is an asset that seems as-yet under-recognized by Wiltonians; those who know it offered ideas for its future.

Fundraising. Philanthropy remains a critical source of revenue for the library but faces headwinds: a) younger families moving in who are not yet invested in or connected to the community; b) an aging population departing or claiming out-of-state residence; c) competition amongst nonprofits.

Board. While those who know the Board as outsiders generally hold it in high regard, there was some critique that it has not been intentionally composed, some concern that politics might encroach on its work, and a sense that too many members are under-engaged.

Plan A conducted roundtable conversations with select groups. Each 75-minute session asked participants to respond to a set of research findings.

Parents of young children remarked on the growing ethnic diversity of Wilton and encouraged the Library to find ways to celebrate and welcome it. Families new to Wilton look to the library not only for their children’s socialization but also for their own and want the Library to offer a more relaxed and welcoming environment for play and social interaction. Some go to neighboring libraries for what they perceive to be more welcoming programs and services.

Adults who work with Wilton’s teen population noted the dramatic rise in teen mental health issues and the ways they are exhibited (anxiety, eating disorders, substance abuse...). While the Library is not a human services provider, they noted the positive role the Library can play as an objective connector to a range of services in and around Wilton that can address social-emotional health and executive function.

Older adults who are frequent library users were particularly sensitive to the needs of peers who may have access and mobility constraints or who feel less able to use technology. They’d like the Library to increase outreach and ensure ease of access to the Library’s rich resources.

Staff echoed much of what we heard through community roundtables, expressing a desire to reach “hidden” and underserved portions of the Wilton population, welcoming newcomers and celebrating diversity – as well as providing a neutral forum for community conversation, particularly at a time of rising political and social tension.

Plan Framework



About the Framework



A strategic plan’s “framework” consists of a plan vision, goals and objectives.

A *plan vision* describes the future state that Wilton Library hopes to achieve through this plan: the role that the organization aspires to play, and the impact it will have on the community and its organizations.

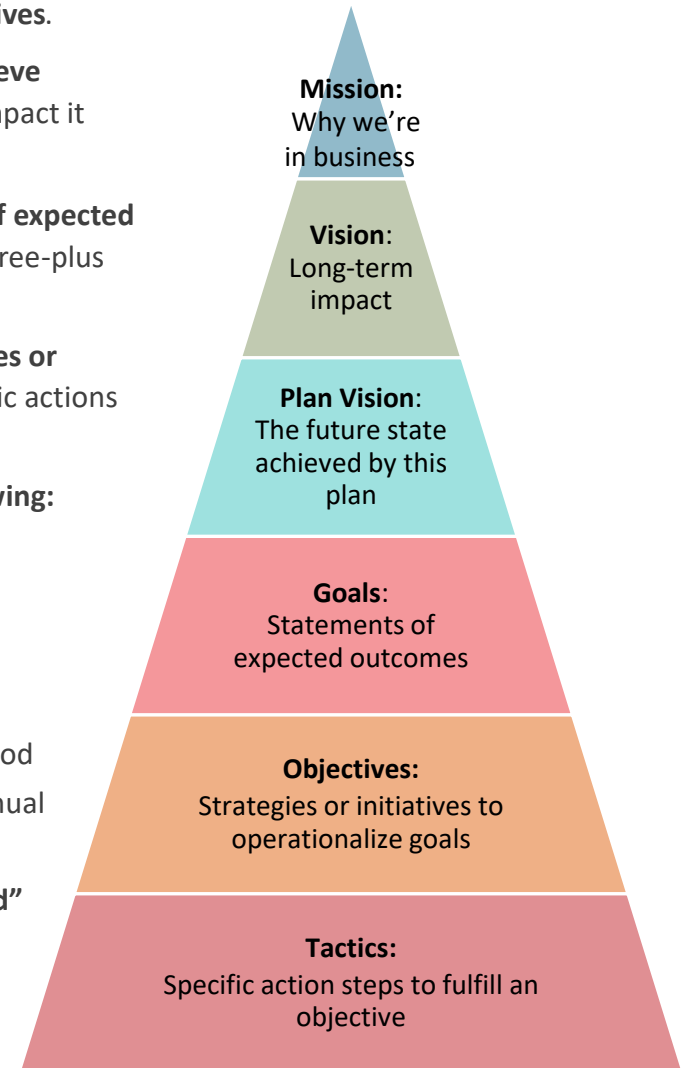
Wilton Library’s strategic plan is framed by four key *goals*—statements of expected outcomes or impacts—that the organization aims to achieve in the next three-plus years in support of its mission and to realize the plan’s vision.

Objectives were established to achieve each goal. Objectives are strategies or initiatives that are implementable over three years. Objectives have specific actions and measurable outcomes.

Each objective has been turned into a *tactical plan* that details the following:

- a. The person or position responsible for implementing the objective
- b. The rationale behind the objective
- c. The outcomes the objective intends to achieve
- d. The metrics that will be used to measure success
- e. The implementation steps that will be pursued over a three-year period
- f. The financial implications of the objective, including up-front and annual operating costs and anticipated savings or revenues it will achieve

The tactical plans for implementation live in separate documents “owned” by staff for implementation purposes.



A strategic plan should function in service to an organization’s mission, which is defined as the business of an organization or the purpose for which it exists. Wilton Library’s Board and staff affirmed the organization’s mission which was felt to have great clarity and focus:

Mission: We are the cultural and intellectual center of Wilton. We inform, enrich, connect, and inspire our community.

Within the context of a strategic plan, a mission operates in service to a soaring vision for the impact that an organization intends to have on the community that it serves. With this strategic plan, Wilton Library has crafted a vision statement that signals its intention to more emphatically serve the entirety of the Wilton community:

Vision: Wilton Library will fulfill the diverse needs of our changing community by providing informative programs, comprehensive resources, innovative technology, stellar services, and access to our unique assets, with plentiful opportunities to explore, learn, and create in an environment where *everyone* is made to feel safe and welcome. We will hold ourselves to the highest ethical standards and measure our success by the levels of participation and satisfaction in library programs and services.

Participation and satisfaction can be measured in a number of ways, including ‘hard numbers’ around circulation, program attendance, volunteer hours, and financial contributions, but also through qualitative surveys that measure the impact that the Library’s programs, resources, technology, services and other assets have on our public.

Position the Library at the center of Wilton at a time of growth and change.

Context: We believe that the public library is, in many ways, the most democratic of community institutions, reliably offering free and open access to its holdings for the widest possible public. But good public libraries aren't static repositories; they respond to community needs and adapt their collections, programs, and services to current and potential audiences. Excellent public libraries do more: they engage actively with the communities they serve, they anticipate needs, and they introduce collections, programs, and services that demonstrate their enduring value, especially at times of change. Wilton is experiencing a time of change and the Library's planning process identified key areas of opportunity that it can embrace to emphatically make its case as the most dynamic of democratic institutions at this evolving community's center.

Objectives

1. **NEWCOMERS.** Welcome newcomers into our evolving community through active outreach and targeted resources, information, services and collaborative programming.
2. **CIVIC DIALOGUE.** Through our policies and programs, advance our role and responsibility as an objective facilitator of access to information and a tested forum for civil discourse.
3. **FACILITY & FOOTPRINT.** Solidify the Library as an anchor institution in the development of Wilton Center, optimize the use of our space and grounds for current needs, and consider opportunities and funding for additional space for longer-term needs.
4. **DIVERSE COMMUNITY.** Bring together the many languages, identities and cultures that now make Wilton a place of diversity.

Meet the evolving needs of Wilton residents at every life stage.

Context: Unlike most any other civic institution, the public library aspires to be “all things to all people.” That doesn’t mean the Library’s collections, programs and services should lack focus. The needs of each segment of the population are unique and, in any given period, reflect the concerns, challenges and temperament of the time. In Wilton, a new generation of young families has planted roots and they come with their own set of expectations and approaches to parenting; a growing adolescent population is facing mental health challenges; adults too often move beyond the public library to meet their needs once children are out of the house but benefit from opportunities to connect with others and with their continued aspirations; and the business community not only spans the breadth of Wilton life – from its store owners to its entrepreneurs – but also touches every shopper and almost every household.

Objectives

5. CHILDREN. Provide welcoming, engaging and flexible programming and resources in spaces that meet the needs of children and their families.
6. TEENS. Engage and address the rise in challenges facing teens by ensuring that Wilton Library continues to be a welcoming, inspiring and safe place.
7. ADULTS. Make the Library a “go to” place of personal and professional learning and enrichment through increased awareness, engagement and access for adults of all ages across our communities.
8. BUSINESSES. Build stronger bonds with Wilton’s business community so the Library becomes a valued resource and builds mutually beneficial partnerships.

Activate The Brubeck Collection as a marquee asset and point of pride for Wilton.

Context: Few if any public libraries of Wilton's size house a collection like The Brubeck Collection, which is of significance to the world of jazz, the history of American music, and American history at a time of rapid cultural, social and political ferment. The collection is an exceptional asset; it is also an exceptional responsibility. Wilton Library must carefully balance its responsibility to the Town and residents that it serves with its responsibility to the community of music aficionados and scholars who come from near and far, as well as to the Brubeck family which has entrusted the Library with a priceless resource.

Objectives

9. **ENGAGEMENT.** Use The Brubeck Collection as a catalyst for performance and education (musical, historical, cultural, social) in partnership with other institutions to keep the collection alive and relevant.
10. **COLLECTION ACCESS.** Enhance and expand online access to The Brubeck Collection through digitization, a browsable database, and virtual exhibits to reach both scholars and the public while ensuring the long-term preservation of the physical archive.

Ensure the Library's strong future and its capacity to serve successive generations effectively.

Context: Wilton Library's track record attracting committed Board members, a talented staff, and generous volunteers and contributors over many years has helped build the institution it is today. But in every era, past is merely prologue. There are new challenges to engaging volunteers and a younger generation tends to view their philanthropic commitments through a different lens than their parents' generation; they look at the performance of public institutions differently, too. The emphasis now is on an economy of resources for demonstrable impact, and meaningful engagement for demonstrable results. Wilton Library needs to ensure that its approach to volunteer engagement, fundraising, and to the way that it is governed and operates is responsive to a changed landscape in each of these key areas.

Objectives

11. **FUTURE GEN.** Develop a future generation of volunteers to become invested in the Library and in leadership roles.
12. **FUNDRAISING.** Strategically enhance fundraising and grow support through focused initiatives that draw contributions from public and private sources.
13. **GOVERNANCE.** Streamline the Board's work to capitalize on the time and talent of its committed members.
14. **STAFF.** Prioritize developing our staff to ensure the Library has the expertise it needs for a new era of service.
15. **SYSTEMS.** Strengthen our technological infrastructure in service to strategic plan objectives and evolving patron and staff needs.

Plan Implementation



Implementation of strategic plan objectives will range in cost, including some initiatives that will require significant investment, and others that will be cost-neutral or may be funded through the reallocation of existing resources – particularly where current staff are responsible. For some, the investment will be one-time (such as new furnishings in the Children’s Library), while other objectives will lead to ongoing costs (such as the already-budgeted position devoted to adult programming). Funding for implementation can be leveraged via a variety of approaches, including:

- Accumulated reserves and endowment
- Budget efficiencies and realignment of budget priorities
- An annual strategic plan implementation budget
- Targeted outreach to foundations, corporations, and individuals for gifts earmarked for specific initiatives

A high-level implementation timetable organizes objectives according to a range of criteria around impact, priority and cost and will depend, in part, upon resource development over time. In addition, we considered staff assigned to each objective, trying not to overload individual staff members in any given year with implementation responsibility.

Oversight for strategic plan implementation will take place as follows:

1. Wilton Library’s Management Team will review progress quarterly, objective-by-objective, and determine where adjustments are needed to the plan.
2. Wilton Library’s Management Team will present a status report and/or progress dashboard to the Board twice annually, with periodic updates on specific objectives.

Additionally, significant updates should be offered as news items through the Library’s newsletter or other communications channels, and the annual report should highlight strategic plan-related initiatives and investments. This will encourage Wilton Library donors, patrons and the larger community to support Wilton Library as a “planful” organization that is making deliberate and meaningful progress towards its goals – which were informed by community input.