



**E. D. LOCKE  
PUBLIC LIBRARY**

McFarland, Wisconsin

## 2024 - 2029 Strategic Plan

### MISSION

To provide high-quality materials and services to fulfill the informational, recreational, educational, and cultural needs of the entire community in an atmosphere that is welcoming and respectful.

### VISION

Welcoming all to an engaging environment,  
providing state-of-the-art library services.

### INTRODUCTION

E. D. Locke Public Library's current strategic plan was approved by the Library Board on July 1, 2019. The five-year plan dated 2019 through 2024, identified five major goals with primary objectives. Despite major interruptions to service and operations during the COVID-19 pandemic, E. D. Locke Public Library staff have successfully worked through the goals and objectives of that plan. Anticipating the conclusion of the previous strategic plan, Library Director Heidi Cox assembled an ad-hoc Strategic Planning Committee and with the support of the Library Board, engaged Rachel Arndt Consulting, LLC in early 2023. Rachel Arndt facilitated the work of the Strategic Planning Committee, culminating in a new five-year strategic plan covering 2024 through 2029.

## METHODOLOGY

The Strategic Planning Committee was made up of community members, library supporters, and library staff members. The committee members represent a variety of key library stakeholders including library staff, young families, students, older adults, volunteers, business owners, community organizations, village government, and non-profit sectors. The ad-hoc committee was approved by the Library Board on December 5, 2022.

Heidi Cox – Library Director

Kelly Heasty – Assistant Library Director

Ann Engler – Adult Services Library Assistant

Ken Machtan – Library Board President

Hilary Brandt – McFarland Equity Project, Village Board Trustee

Andrew Briddell – community member

Staci Fritz – Library Board & Friend of McFarland Library

Lara Mays – Public Relations/Marketing Director & Foundation Executive Director -  
Stoughton Health

Shawn Miller – Youth Center Board President, Bird Festival Committee member

Rob Sherman – McFarland Lions Club, Library Volunteer

Aaron Tarnitzer – McFarland School District Superintendent

In preparation, Consultant Rachel Arndt reviewed the following documents:

- E. D. Locke Public Library Strategic Plan 2019 – 2024
- E. D. Locke Facilities Study 2022
- Village of McFarland Strategic Plan 2020 – 2030

The Strategic Planning Committee met monthly from February through July 2023. Facilitated discussions established the current status of the community and library. The committee worked collaboratively through facilitated, participatory discussions, created a community asset map, performed a SWOT analysis, and completed visioning exercises, all designed to elicit significant feedback about E. D. Locke Library and its future.

## METHODOLOGY (con't)

Monthly meetings typically had seven or more participants. The Strategic Planning Committee was highly engaged in the facilitated meetings with all attendees participating in discussions and exercises. The consultant facilitated individual and group exercises during which the committee members shared their ideas and thoughts. Participants recorded and logged their feedback during each meeting and the consultant presented a summary at each subsequent meeting to ensure accuracy.

In addition, the consultant held a facilitated listening session for E. D. Locke Public Library staff on June 21, 2023 to gather feedback and ideas to incorporate into the strategic plan.

## FINDINGS

A review of E. D. Locke Public Library's 2019 – 2024 Strategic Plan demonstrates that the library director and staff addressed all goals and objectives within the duration of the strategic plan timeframe. Feedback from the Strategic Planning Committee affirmed that E. D. Locke Public Library has a positive reputation for success and engagement within the McFarland community.

Library Director Heidi Cox shared data with the Strategic Planning Committee that shows the E. D. Locke Public Library service area is positioned for both population and library user growth.<sup>1</sup> Library data demonstrates the growth of E. D. Locke Public Library's statistical measures on cardholders, circulation, and program attendance. That continued success is pushing the capacity limits of the current facility and staff members.

Through a facilitated asset mapping activity, the Strategic Planning Committee identified that McFarland community members derive a strong identity through their involvement with local organizations, indoor and outdoor recreation, and local events. The asset mapping activity determined that this involvement is an important component of the community's quality of life. Community members also benefit from local investment in infrastructure and municipal projects. In an assessment of the types of people that leverage community assets, the committee identified a wide range of ages and lifestyles that attend community events and use the library.

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<sup>1</sup> Village of McFarland Market Data <https://www.mcfarland.wi.us/183/Market-Data>

## FINDINGS (con't)

The asset mapping activity also showed that challenges the community face include: commuter lifestyles that pull residents away from McFarland resources and businesses, lack of jobs in the immediate McFarland community, no clearly defined public square/village center, limited low-income/affordable housing, and limited social services, local media, and public transit in the village. *Some of these challenges are also addressed as part of the McFarland Village Strategic Plan 2020 – 2030.*

The Strategic Planning Committee also participated in a SWOT analysis to assess E. D. Locke Public Library's strengths, weaknesses, opportunities, and threats. The committee concluded that at the conclusion of the 2019 – 2024 strategic plan, E. D. Locke Public Library is working from a position of strength and effectively utilizing its planning documents for the benefit of the library and community. The committee agreed that the library leadership and staff contribute significantly to the success of the library resulting in meaningful program participation and library use. The committee shared that the library staff knowledge and expertise led to a positive, welcoming, and helpful environment for patrons using the library. The efforts to have library staff participate in community events and outreach were also viewed as beneficial to the community and the library.

Library staff provided feedback that library youth programming strongly attracts young families to E. D. Locke Public Library. The staff were proud of the library staff culture which they described as solution-oriented, supportive of the community, and focused on quality of service. They noted that patron feedback is positive about the library's collections, programs, and services.

The committee and staff discussed that the lack of flexible space and study/meeting rooms in the library is not responsive to current community needs. The library has presently outgrown its current programming space and that has required ticketing for popular events, which results in turning people away from library programs. The volume of programming has also pushed the storage limits of the facility. A robust programming schedule also means that spaces must be changed over quickly and require more flexible furniture and equipment. In addition, the aging facility requires ongoing maintenance and replacement of mechanical systems.

The committee also identified that, despite library efforts, some community members remain unaware of library programs and services or sometimes missed library marketing materials. This effort to generate publicity is time consuming and strategies must be adjusted due to the rapid changes in social media tools and technology.

## FINDINGS (con't)

The committee also brainstormed potential threats to the library's future success that included: staff turnover, changes to community or municipal support, and a reduction in available resources either through a large-scale financial recession or municipal budget changes. The Strategic Planning Committee affirmed that E. D. Public Library is not imminently facing these threats. By noting these potential threats, the strategic plan can offset the possibilities with sound goals and objectives.

Through strategic visioning exercises, the Strategic Planning Committee generated concepts and ideas that resulted in the following goals and objectives for E. D. Locke Public Library, presented to the Library Board of Trustees on August 7, 2023.

# E. D. Locke Public Library

## 2024 - 2029 Strategic Plan

### **Goal 1) The Library's collections, programs, and services reflect the needs of the community.**

- Develop a library service model for outreach, community engagement and satellite or express library.
- Create library outreach kit for community events.
- Expansion of youth and teen programming.
- Adult programming appeals to community interests and connects patrons to library materials and collections.
- Pilot all-age programming to appeal to broader audiences and interests.
- Establish and use diversity, equity, and inclusion criteria for collections, programs, services, displays, and book recommendations.
- Seek grants and partnerships to support library efforts for diversity, equity, and inclusion.
- Facilitate community dialogue to gather information and data on community needs.
- Establish a communication plan for effectively sharing library marketing materials to reach specific audiences for programs and services.
- Expand collection with a *Library of Things*, made up of library-loaned objects, gadgets, tools, games, or kits.
- Collaborate with the school district to participate in leveled literacy challenges that support readers at all developmental stages.

# E. D. Locke Public Library

## 2024 - 2029 Strategic Plan

### **Goal 2) The Library is recognized as a valuable community contributor.**

- Community engagement and event participation showcases the library prominently.
- The library actively participates in community decisions and engages municipal leaders about library plans, assets, and benefits.
- Engage library users and supporters in library awareness and advocacy.

### **Goal 3) The Library cultivates and expands strong community support.**

- Reinvigorate Friends of the Library through membership growth.
- Establish priorities for Library Finance Committee.
- Continued growth of library endowment.
- Seek sponsorship opportunities to underwrite programs or provide technology or equipment.
- Develop patron feedback mechanism.

# E. D. Locke Public Library

## 2024 - 2029 Strategic Plan

### **Goal 4) The Library leverages technology, new tools, and services to benefit library staff and patrons.**

- Launch and evaluate reservation software for library spaces.
- Evaluate and pilot express, self-service, or off-hours services for patron convenience.
- Assess alternatives to current library copy/print/fax and translation technologies.
- Utilize library technology such as push notifications, the library website, search engine ads, and social media accounts to identify and reach the specific audiences that use these technologies.
- Explore hands-on technology teaching opportunities for library users, especially older adults.
- Explore feasibility of digital signage on exterior of library.



# E. D. Locke Public Library

## 2024 - 2029 Strategic Plan

### **Goal 5) The Library pursues improvements to the library building and internal spaces which are necessary to enhance library collections, programs, and services.**

- Investigate shelving alternatives and reorganize current collections to gain efficiency, visibility, and accessibility.
- Explore alternate sites for library programs or services through satellite or express locations.
- Evaluate early literacy center (ELC) equipment for children's area.
- Identify areas to align safety and security protocols and language with other municipal departments and school district.
- Using the findings from 2022 facilities study and ongoing facility maintenance reports, determine library expansion and funding plans.
  - Any immediate improvements should be incorporated into library expansion to maximize budget investment.
  - Priority placed on programming space, meeting and study rooms, and overall flexibility.
  - Include dedicated teen space.
  - Perform an efficiency review of staff work spaces.

# E. D. Locke Public Library

## 2024 - 2029 Strategic Plan

### **Goal 6) The Library uses a continuous growth model for the professional development and management of library staff.**

- Evaluate staff alignment to ensure organizational structure meets library service needs.
- Staff receive relevant continuing education on best practices, service improvements, and library technology.
- Perform systematic policy/procedure review.
- Hold yearly in-service for all library staff.

## CONCLUSION

These goals and objectives were reviewed and endorsed by the Strategic Planning Committee at the July 13, 2023 meeting. A copy of this plan will be presented to the Library Board of Trustees on August 7, 2023. Upon approval of the plan, the consultant will deliver final copies of the strategic plan to the Library Director and the Library Board of Trustees.

## PREPARED AND SUBMITTED BY:



Library Consultant

August 1, 2023

Rachel Arndt Consulting, LLC

