



# CHARLTON PUBLIC LIBRARY STRATEGIC PLAN FOR FISCAL YEARS 2025–2029



**Submitted by:**



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# Charlton Public Library

## Strategic Plan for Fiscal Years 2025–2029

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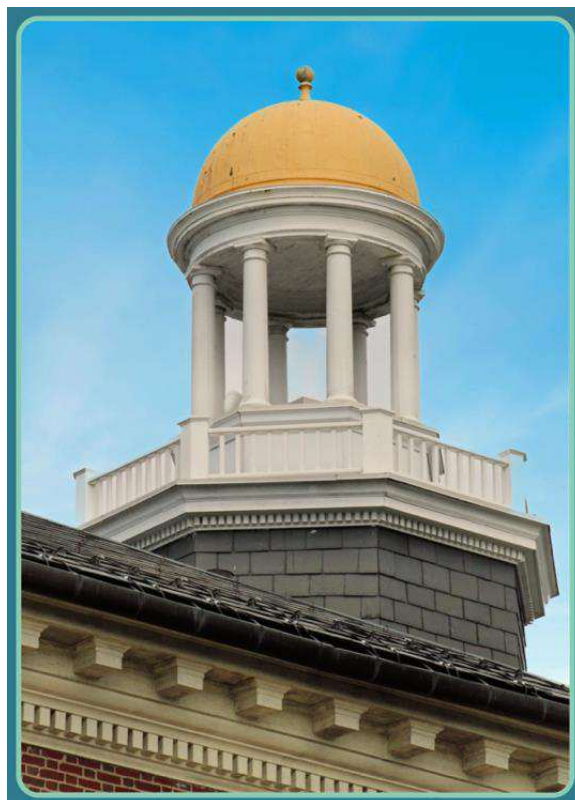
## INTRODUCTION

Founded in 1816 as the Female Social Library, Charlton Public Library has seen many changes over the last 200-plus years, not the least of which was adapting our services to navigate through a global pandemic.

Throughout all these changes, one theme is abundantly clear: our Library's guiding ethos is, and always has been, providing exceptional public service to our community. This means that we must continuously evaluate and meet our community's changing needs and wants, and the best way to do that is with a strategic plan.

A strategic plan is a document that sets an organization's goals for a multi-year timeframe, usually three to five years. It is intended to help the organization achieve its overall mission and vision.

The Massachusetts Board of Library Commissioners (MBLC) recommends that every library maintain an up-to-date strategic plan as a management best practice. To be eligible for Construction or Library Services and Technology Act (LSTA) Grants, libraries must have a current, approved strategic plan on file with the MBLC.



Charlton Public Library's last strategic plan covered the fiscal years 2020 through 2024, which included the COVID-19 pandemic. The most significant change since the last plan was developed is that the Library became nimbler and more creative when faced with the challenges of providing materials and services in non-traditional ways during a time of crisis. Indeed, while many in our community were isolated from their normal social activities, our staff responded by doubling down on their efforts to serve them with commitment, enthusiasm, and creativity.

Our new strategic plan covers fiscal years 2025 through 2029 and remains focused on providing the best possible service to our community.

## BACKGROUND INFORMATION

### Charlton Community Profile

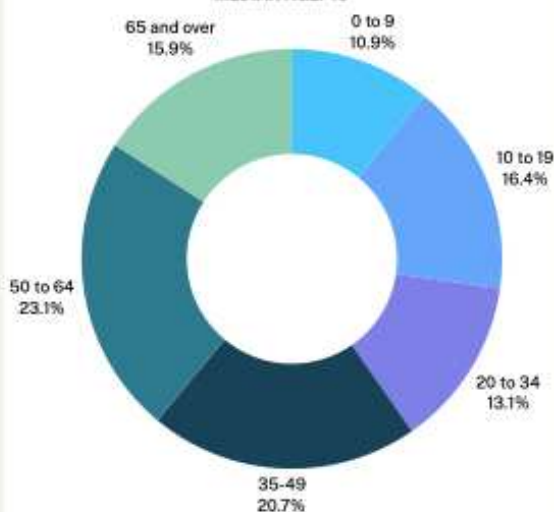
# Charlton Community Profile 2023

## GENERAL STATISTICS

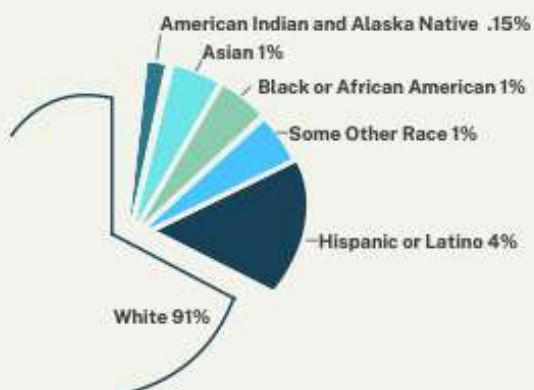
**Median Household Income:** \$113,896  
**Households:** 4,833  
**Households with Broadband:** 92.8%  
**Employment Rate:** 62.2%  
**Poverty Level:** 3.8%

## AGE DISTRIBUTION

MEDIAN AGE: 43



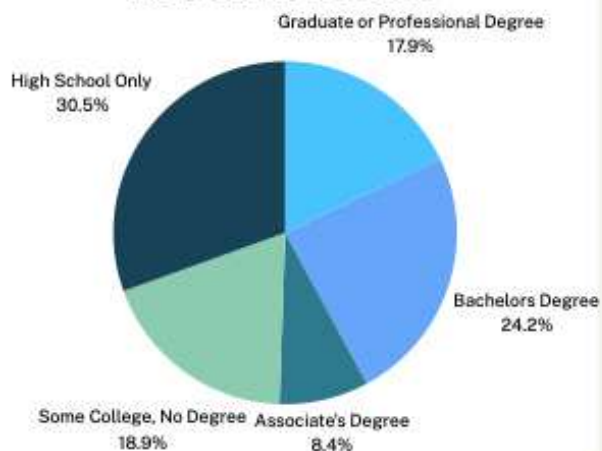
## RACE AND ETHNICITY



## POPULATION

**2020 Population:** 13,315  
**2030 Projected Population:** 15,076

## EDUCATION LEVEL



## CHARLTON SCHOOLS

### Dudley-Charlton Regional School District

**Enrollment:** 3,429  
**High Needs Students:** 44.3%  
**Low Income Students:** 32.8%  
**English Language Learners:** 3.5%  
**Students With Disabilities:** 17.9%

### Bay Path Regional Vocational Technical High School

**Enrollment:** 1,185  
**High Needs Students:** 42.8%  
**Low Income Students:** 34.6%  
**English Language Learners:** 1.6%  
**Students with Disabilities:** 13.9%

Data from Central Mass Regional Planning Commission [cmrpc.org](http://cmrpc.org), Massachusetts Department of Elementary and Secondary Education [reportcards.doe.mass.edu](http://reportcards.doe.mass.edu), United States Census Bureau [census.gov](http://census.gov)

# Charlton Public Library Profile

Fiscal Year July 1, 2022 - June 30, 2023

## Circulation

- **Physical Items** (books, audiobooks, movies, etc.): 90,680
  - **Digital Items** (books, movies, etc.): 26,659 downloaded/streamed
  - **Holds Placed:** 9,773
- 
- **Museum and Attraction Pass Uses:** 352
  - **Hotspot Checkouts:** 233
  - **Wireless Sessions:** 9,850
  - **Computer Usage:** 1,191

- **Library Visitors:** 56,899
- **Cardholders:** 6,120
- **CPL Physical Collection:** 49,133
- **Network Shared Physical Collection:** 1,765,868
- **Network Shared Digital Collection:** 241,249



- **Adult Programs:** 226
- **Children's & Teen Programs:** 280
- **Program Attendees:** 8,160
- **Meeting Room Bookings:** 1,076

- **Open Hours/Week:** 49 from Sept.-May; 43.5 from June-August
- **Board of Trustees:** 6 Elected Members
- **Library Staff:** 8 Full Time and 3 Part Time
- **Facility:** 27,000 Square Feet



Data from Assabet Interactive, Charlton Public Library, CWMARS





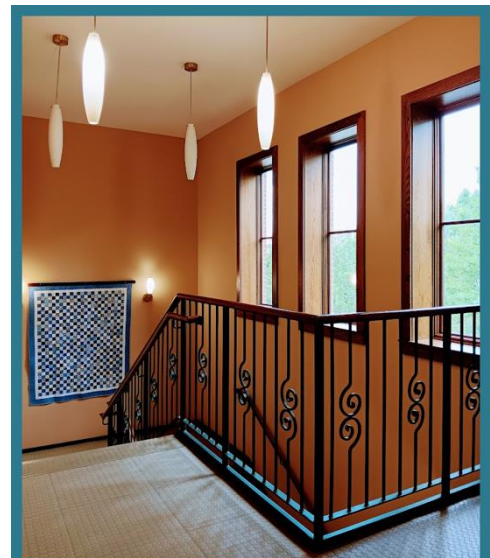
## The History

The Charlton Public Library began in 1816 as a private library association known as the Female Social Library. One hundred and eight women paid a one-dollar subscription fee. In 1860, a group of young men founded their own library known as the Charlton Young Men's Library Association or the Charlton Agricultural Library Association. This library registered fifty-eight men and nine women who each paid a one-dollar subscription fee and an annual charge of twenty-five cents. In 1882, the members of both libraries voted to merge the two libraries and transfer the library to the Town of Charlton to be a public library. The town voted to accept the transfer, and the Charlton Public Library was founded. A complete history of the Library can be found on the Library website: [charltonlibrary.org](http://charltonlibrary.org).

## The Building

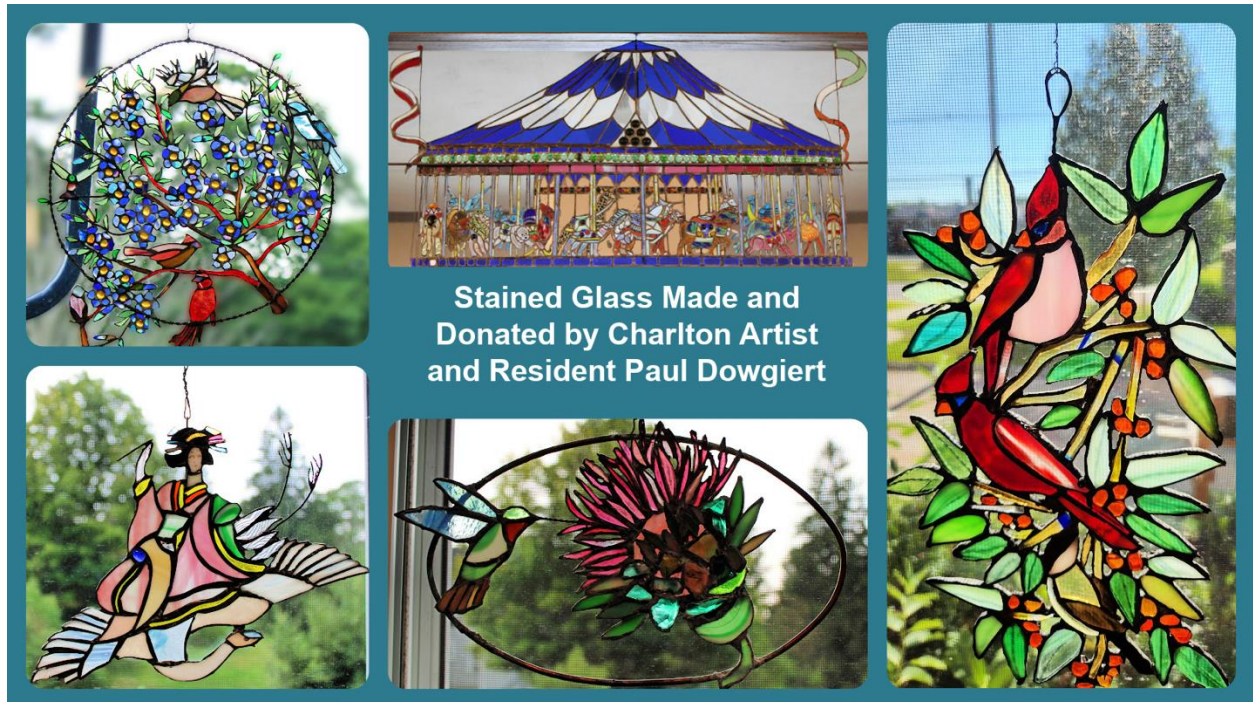
In 1905 Charlton native William Henry Dexter presented Memorial Hall to the town. The building included a room for the Library as well as space to house all town offices. The Library stayed in that same 1,100-square-foot room for the next ninety-three years. In 1998, town offices were moved across the street to the old high school building, and a town meeting vote transferred custody of Dexter Memorial Hall to the Board of Library Trustees. The Library then expanded into the rest of the approximately 3,100-square-foot building.

In 2004, the Library secured a construction grant that enabled it to expand to approximately 27,000 square feet. In July 2007, the newly renovated and expanded Library opened to the public. It features three meeting rooms, including the 2,500-square-foot Dexter Hall on the third floor. The main level features a comfortable seating area, quiet study rooms, a local history room, and a book sale room run by Friends of Charlton Public Library. Numerous computers are available for public use, and there is wireless access both inside and outside the building. The lower-level Children's Room is a hub of



activity with story times, programs, and special performances scheduled throughout the year. The outdoor Reading Garden was built with privately raised funds and is a great place to get some fresh air, read a book or magazine, or just watch the world go by.

Of special note, the stained-glass windows and many pieces throughout the building were made and donated by artist, teacher, and Charlton resident Paul Dowgiert (1930-2024).



## The People

The Library is currently staffed by eight full-time and three part-time employees. Positions include:

- Library Director
- Assistant Director/Head of Adult Services
- Head of Youth Services
- Children's Librarian Assistant
- Technical Services Assistant
- Circulation Associates
- Pages
- Custodian

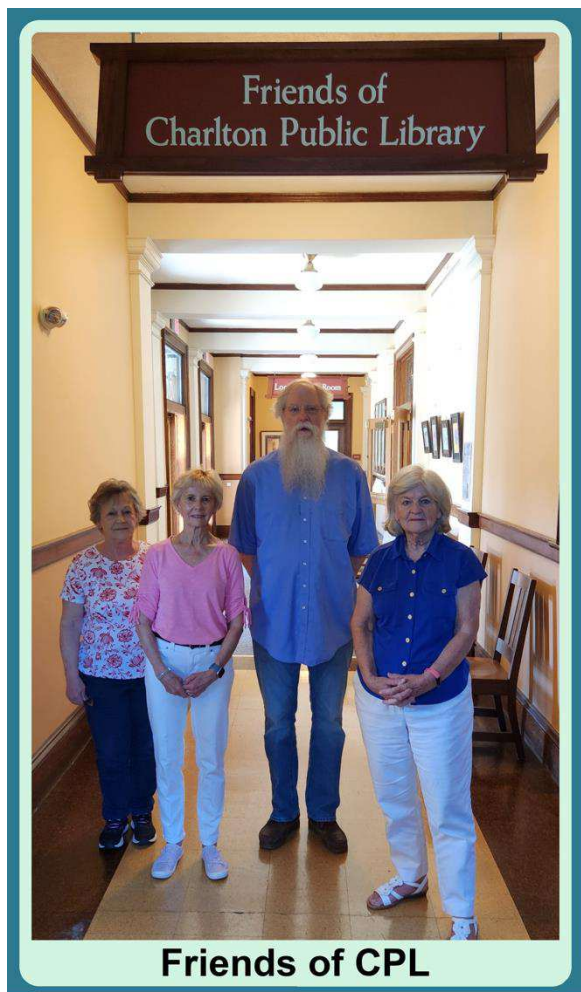






**Board of Trustees**

The Charlton Public Library Board of Trustees consists of six elected members who serve a term of three years. The Trustees' mission is to generally oversee the management of the Library, including the selection of the Library Director, the approval of the budget, and the establishment of policies. They also act as Library advocates in the community.



**Friends of CPL**

The Friends of Charlton Public Library supports the Library through fundraising endeavors and volunteer service. Funds raised by these dedicated volunteers support programs and services that are not funded in the town's budget. The Friends promote and advocate for the Library as a center for lifelong learning, cultural enrichment, and a community gathering place.

## OUR PLANNING PROCESS

In October 2023, the Library engaged Barbara Alevras of Sage Consulting Services to guide us through the strategic planning process. Barbara guided us through a series of activities designed to collect feedback from the community and key stakeholders. A customized flowchart served as our roadmap as we progressed through the process (*see Appendix A—CPL Strategic Planning Project Flowchart 2023-24*).

At the start of the project, we formed a Strategic Planning Advisory Committee (SPAC) composed of 15 people: community members and representatives of town government, local organizations, local schools, Trustees, Friends of Charlton Public Library, and staff. The



committee supported the strategic planning effort by brainstorming community engagement ideas, drafting and prioritizing community vision statements, participating in data-gathering activities, and reviewing components of the final strategic plan.

Between November 2023 and February 2024, the Library conducted the following assessment activities (*see the Appendices section for these and other final reports*):

- One Community Visioning Exercise
- Three Focus Groups (two adult, one youth)
- Two SOAR (strengths, opportunities, aspirations, results) Exercises
- Two Surveys (one adult, one youth) yielded 794 responses.



In addition to the above exercises, we compiled data related to Charlton demographics from census and school data sources, and Library usage data from statistical reports.

Data from these sources was analyzed, synthesized, and summarized. The results formed the Mission and Vision Statements, the Goals and Objectives, and the Community Visioning Statements contained in this Strategic Plan.

## WHAT WE LEARNED

During the engagement and assessment phase, we received extensive, valuable feedback that offered important insights from staff, boards, and the community about current perceptions, strengths, challenges, and future expectations. Knowing that our Library and staff are highly valued as a community resource is heartening. Many ideas and suggestions were shared on how the Library can build on our strengths to expand our role as a community hub. Based on feedback, we identified the following six areas of focus, which formed the basis of our Goals and Objectives for the Plan term.

**Facility:** Suggestions were made to optimize our current configuration with a focus on meeting and gathering spaces, adding a dedicated teen room, enhancing lighting, creating more outdoor seating, and addressing parking issues.



CPL Charitable Trust, Friends of the CPL, and CPL Trustees' Board Members: What Are The First 3 Words You Think of When You Think of the Library?

**Staff:** Community members have a very high opinion of our Library staff. Community survey respondents ranked all service categories *Above Average* or *Excellent* by 95%+. Suggestions included adding and optimizing staff and continuing the staff’s professional development education and training, with an emphasis on maintaining a culture of staff satisfaction.

**Collection:** A strong emphasis on expanding and diversifying our offerings is key, as well as ensuring our collections (both physical and digital) are current and relevant. We received many ideas for potential new offerings that will be considered during this plan’s term.

**Programming:** The community clearly wants more programming for all ages, covering a broad range of interests. Suggestions were made for incorporating hybrid delivery of programs, more collaboration, and reaching those not physically able to come to the Library. Community members also expressed interest in technology classes and support. Additional funding for programming will also be explored.

**Outreach:** Partnering with other area organizations, schools, and the business community to expand our reach and support was a recurring theme.

### **Marketing:**

The need to increase awareness of Library programs and services utilizing diverse platforms was abundantly clear. Developing a marketing and promotion plan will ensure we reach our target audiences more efficiently and effectively.

## **OUR PLAN**

### **Community Vision Statement**

The Library’s fifteen-person strategic planning advisory committee brainstormed a series of vision statements reflecting the ideal Charlton. Following is the community vision statement this group believes the Library can best support and positively impact:

**Charlton cultivates excellent, diverse, and inclusive academic, vocational, recreational, and cultural lifelong learning opportunities for people of all ages.**

*Appendix B—CPL Community Vision Statement Results Report 2024* presents the full community visioning exercise results.





## Mission Statement

To provide free and open access to all people, enriching their lives by creating connections, advancing knowledge, and inspiring creativity.

## Vision Statement

To be an inclusive, safe, and welcoming space for the Charlton community to connect, learn, create, and share.

## Strategic Goals and Supporting Objectives

**STRATEGIC GOAL 1 - FACILITY: Maintain a welcoming, safe, comfortable, and accessible building and grounds that meet our community's needs and wants.**

- 1.1 Optimize Library space to meet operational and community needs.
- 1.2 Expand space for meeting, reading, and relaxing.
- 1.3 Improve accessibility of building and grounds.

**STRATEGIC GOAL 2 - STAFF: Cultivate an organizational culture of continuous improvement and well-being.**

- 2.1 Attract and retain an adequate number of high-quality staff committed to providing exceptional public service.
- 2.2 Provide staff with ongoing training and professional development opportunities.
- 2.3 Foster a positive, supportive, and collaborative work environment.
- 2.4 Assess staff levels and compensation to ensure parity with peer libraries.
- 2.5 Develop internship and volunteer opportunities.

**STRATEGIC GOAL 3 – COLLECTION: Provide collections that inspire the joy of reading, support lifelong learning, foster human connections, and enrich lives.**

- 3.1 Maintain diverse, popular, and classic materials in multiple formats.
- 3.2 Ensure collection is current, relevant, and easily navigated.

- 3.3 Expand collection of non-traditional materials.
- 3.4 Ensure collection supports schools' curricula.
- 3.5 Increase digital device collection for lending.

#### **STRATEGIC GOAL 4 – PROGRAMMING: Develop programs and services that meet the needs and desires of community members of all ages and abilities.**

- 4.1 Expand Library programming to all age groups.
- 4.2 Expand Library programming to cover a broad range of interests.
- 4.3 Expand collaborative programming with other organizations.
- 4.4 Enhance access to Library materials.
- 4.5 Increase municipal funding for programming.
- 4.6 Continuously solicit patron feedback on program satisfaction.

#### **STRATEGIC GOAL 5 – OUTREACH: Develop a comprehensive, consistent presence in the community.**

- 5.1 Cultivate collaborative community partnerships.
- 5.2 Cultivate relationships with town departments, local organizations, and the business community.
- 5.3 Expand partnerships with schools and other education groups.

#### **STRATEGIC GOAL 6 – MARKETING: Increase awareness and promotion of Library resources, programs, and services.**

- 6.1 Promote and publicize Library offerings using diverse platforms.
- 6.2 Periodically solicit community feedback and respond to changing interests.
- 6.3 Support Friends of the Library initiatives.

### **Annual Action Plans**

The Massachusetts Board of Library Commissioners requires libraries to submit an Action Plan for each fiscal year to remain eligible for grant funding. The Charlton Public Library submits its Action Plan annually, with specific activities, target dates, and task owners based on this strategic plan's goals and objectives.



## Measuring and Communicating Our Progress

The Library Director and department heads will review and update the Action Plan annually. The Library Director will communicate these updates to the Library Board of Trustees and community annually. The Library Director and staff will assess progress, successes, and challenges and make any necessary adjustments quarterly.

### PLAN APPROVAL

On August 15, 2024, the Library's Board of Trustees unanimously approved this Strategic Plan.

### ACKNOWLEDGEMENTS

The Charlton Public Library wishes to thank all those who participated in the Strategic Planning Advisory Committee, including:

- Kirsten Bright
- Tameryn Campbell
- Laura Drinon
- Sheri Dreitlein
- Andrew Golas
- Hope Gray
- Kate Hardy
- Nina Julian
- Nicole Messier
- Jim Moran
- Lance Morin
- Greg Paris
- Shari Russell
- Susan Smolski
- Karen Wall

#### CPL Board of Trustees

**Stefan Sage, Chair**  
**Sherri Westbury, Secretary**  
**Cheryl Meskus**  
**Lance Morin**  
**Frances Mower**  
**Fiona Ryder**

**We also appreciate the Library staff, Board of Trustees, Friends of Charlton Public Library, Charlton Library Charitable Trust, and all members of the community who so graciously took the time to give their invaluable input and feedback.**

## FINAL THOUGHTS

A patron who recently moved to Charlton once said, "When I want to know what a town is like, I visit their library." Indeed, libraries have evolved to be much more than book repositories. Visitors come to play, learn, meet, and socialize. In addition, libraries now offer a multitude of items for checkout in both physical and digital formats. Our *Strategic Plan for Fiscal Years 2025-2029* will guide our efforts over the next five years to meet the varied needs and wants of our community and make Charlton Public Library the very best community resource possible.





## APPENDICES

Following is a list of Strategic Plan document appendices. They are available for download and review at the following link: <https://charltonlibrary.org/Pages/Index/229309/strategic-plan>

**Appendix A—CPL Strategic Planning Project Flowchart 2023-24:** The flowchart presents the strategic planning project methodology, including the timeline, major project milestones, community needs assessment activities, and process participants.

**Appendix B—CPL Community Vision Statement Results Report 2024:** The Library's Strategic Planning Advisory Committee (SPAC) brainstormed a series of vision statements reflecting the ideal Charlton and prioritized the vision statements the Library can best support and positively impact. This report presents a prioritized list of the final community vision statements.

**Appendix C—CPL Community Survey Results 2024:** The community survey was conducted in January 2024. Respondents' feedback is presented in addition to summary results graphs and charts.

**Appendix D—CPL Community Members Focus Groups Summary Report 2024:** Two focus groups for community members were conducted in February 2024.

**Appendix E—CPL SOAR Exercise Summary Results Report 2023:** This report documents the results of an environmental assessment of the Library's strengths, opportunities, aspirations, and results. One SOAR exercise was conducted with the Library's staff, and a second was conducted with Charlton Public Library's Board of Trustees, Charlton Public Library Charitable Trust board members, and Friends of Charlton Public Library board members.

**Appendix F—CPL Teen Focus Group Summary Report 2024:** A focus group for teens was conducted in February 2024.

**Appendix G—CPL Teen Survey Results Report 2024:** The teen survey was conducted in January 2024. Respondents' feedback is presented in addition to summary results graphs and charts.





“A library outranks any other one thing a community can do to benefit its people. It is a never-failing spring in the desert.”

~ Andrew Carnegie