



**Altamont Free Library**  
**Strategic Long-Range Plan**  
**2023-2026**

*Approved April 17, 2023*

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Joseph P. Burke

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Jason Cooper

## **MISSION STATEMENT**

The Altamont Free Library is a state, town and village funded library that provides for the informational, cultural, educational and recreational needs of patrons living within the stated area of the library charter. To this end, the library provides print and non-print materials, interlibrary loan, reference services and programs to its users.

## **COMMUNITY DESCRIPTION**

The Altamont Free Library is the community library for the Village of Altamont in the Town of Guilderland, N.Y. and its surrounding area. This includes the Town of Knox, N.Y., for which the Altamont Free Library is the de facto town library.

The Library's catchment area contains approximately 5,000 residents.

The Altamont Free Library community is a diverse one, containing a broad range of income levels, ethnicities, occupations, religious and political affiliations and interests. The area contains both densely populated villages, as well as rural areas.

The characteristic that unites our members is an overwhelming sense of community-mindedness. The renovation of the historic Altamont Train Station, the library's home since 2012 is a clear expression of that sensibility, driven as it was by a large-scale grassroots volunteer effort over the course of many years.

## **LIBRARY DESCRIPTION**

The Altamont Free Library, established in 1916, is an association library, which provides for the cultural, educational, and recreational needs of its community by providing a range of materials that are free to community members, including books, periodicals, movies and music, digital materials (such as ebooks, digital audiobooks, e-magazines), museum passes, as well as interlibrary loan and reference services. In addition, the library provides programs for members of every age and interest, from toddler storytimes and summer reading programs to book clubs and community potluck dinners.

Since 2017, Altamont Free Library has been named a Star Library by Library Journal on four occasions. Star Libraries are the thirty best performing libraries in the United States in each of nine budget tiers, measured by per capita circulation, program attendance, and public computer use, among other factors. Altamont Free Library has had among the highest scores nationally out of all libraries with budgets between \$100,000 and \$200,000.

We welcome and value all community members.

## INTRODUCTION

In the spring of 2021, Library Director Joseph Burke and the Sustainability Committee of the Altamont Free Library Board of Trustees began planning the process for the development of its new strategic Long Range Plan (LRP). It was quickly realized that the ongoing COVID-19 pandemic would impose serious limitations on the Board's ability to effectively dialogue with our community in a productive and useful way. The Board of Trustees decided, therefore, to extend the 2019-2021 Long Range Plan for an additional year and to re-engage with the planning process during 2022.

In March 2022, the Board of Trustees tasked the Sustainability Committee with the preparation of the Long Range Plan, which in turn created the Long Range Plan Working Group. The LRP Working Group consisted of Trustees Christine Carpenter, Shannon Duerr, and Deborah Marion-Katz and Library Director Joe Burke. Our aim was to review the work accomplished from 2019 to 2022, identify current community needs for library services and to evaluate present services and facilities in relation to these needs, and to identify improvements and new services that will fill those community needs. To ensure that the resulting plan was most reflective of the current and future needs of its community, we created as many opportunities for individuals to make their voices heard as we could, in many cases reaching out to segments of the community that we had never approached for their input before. The result, we believe, is a document that more fully captures the needs, hopes, and aspirations of the people of Altamont and the surrounding communities than any of our previous Long Range Plans.

Time and again over the course of the LRP crafting process, we have returned to a few simple core ideas, among them **community**, **communication** and **sustainability**. In our outreach to the public, in our conversations with municipal leaders and in our Board conversations, these themes have been repeated consistently and clearly. Our stakeholders want Altamont Free Library to be a strong, thriving organization into the foreseeable future. Our stakeholders want us to do all we can to enrich and empower the community we serve and are a part of. And our stakeholders want timely news and information from us in a variety of formats and media. To those ends, we have set ambitious but, we believe, achievable goals for ourselves, and conceived the necessary action steps to make those goals into realities over the next three years and beyond.

## METHODOLOGY

In early April 2022, members of the board's Sustainability/Long-Range Planning sub-committee met with Upper Hudson Library Services (UHLS) Director Timothy Burke for an informational session on strategic long-range planning. Steps to achieving a long-range plan for 2023-2026 years were discussed. The recommendation of the committee was presented to and approved by the full board at its April 2022 meeting.

The long-range planning sub-committee set an ambitious plan designed to solicit input from a wide-range of library stakeholders and unique users. After three years of varied ability to

connect in-person and in other meaningful ways due to the COVID-19 pandemic, the committee (with the blessing of the full board) felt this was an important opportunity to reconnect and take a pulse on what the library is doing well and how it might better serve our users, now and in the future.

To achieve this, facilitated conversations were held with:

- AFL Fifth Graders
- Families & Caretakers of Young Children
- Altamont-Area Seniors
- Knox-Area Residents

Additionally, in August 2022, the board of trustees took part in a SWOT (strengths, weaknesses, opportunities and threats) analysis, facilitated by Upper Hudson Library Services (UHLS) Director Timothy Burke, designed to inform the long-range planning process.

The library's staff (current and former), teenage patrons, former board members, local elected officials and business owners, along with representatives of residents living in Altamont's group homes were also all engaged for their feedback on the library and its service to the community.

In August 2022, members of the Sustainability Committee had the opportunity to meet with Guilderland Central School District DEI Director Matthew Pinchinat, who offered suggestions on fostering a more inclusive and collaborative library community and library offerings. The invaluable guidance offered by Matthew Pinchinat helped inform the goals, objectives and action steps found in this plan. We were pleased to have this opportunity to make this important community connection, which the board intends to grow in the coming years.

Along with the facilitated conversations, a series of on-line surveys were created to solicit the public's input. Questions on demographics and library use (e.g. programs attended, resources accessed), as well as opportunity for participants to indicate strengths and areas for improvement were included in each.

A general survey, open to all in the community, was referenced in the library's weekly column in the Altamont Enterprise, the newspaper of record in this community. It was publicized through the library's website and at its circulation area, by word-of-mouth and with paper flyers distributed in backpack mail to all Altamont Elementary School students in conjunction with summer reading, and during its 2022 summer concert series. The online survey remained active from May through September 2022.

Tailored surveys were created for feedback from area businesses, families that are homeducating, and educators in Guilderland School District. In addition, drop boxes with paper surveys were distributed in four locations in the Hilltowns of Knox and Berne.

The goal in soliciting feedback from these individuals and groups was to ensure a more robust representation of the library's various stakeholders. In total, nearly 250 library stakeholders participated with the various conversations and survey methods.

At the conclusion of the survey process, the long-range planning sub-committee and Library Director Joe Burke met to analyze the data that had been gathered. To the degree possible, the anecdotal information reported by all groups and sources was organized using the SWOT categories (strengths, weaknesses, opportunities and threats.) Trends and themes were also noted. The compiled information was provided to the board of trustees for its review prior to its goal setting session held in November 2022 see attached).

In October 2022, the current board of trustees and Library Director Joseph Burke gathered for the purpose of setting three overarching goals and related objectives based on the library stakeholder feedback and their own input. This session was facilitated by UHLS Director Tim Burke. From December 2022 through March 2023, the Long Range Planning committee used the feedback of the board to craft the goal statements and related objectives and action steps for the 2023-26 years. These were shared with the full board for their consideration at the regular meeting of the full board in February 2023 and fine-tuned based on input gathered from the full board during an early March 2023 Sustainability Committee meeting.

At its April 2023 meeting, the library's board of trustees approved the following set of goals, objectives and related actions steps that will guide the work of the library board from May 2023 through June 2026.

## **PERPETUAL STEPS/STANDARD OPERATING PROCEDURES**

The following items reflect the ways the board and staff will commit to the on-going betterment of the library and its operations over time. These are items that have been given precedence in previous long-range plans and continue to be flagged as vital for maintaining the smooth operation of the library.

- Altamont Free Library will continue to evolve its digital/social media presence with such tools as the web, Facebook, Twitter, Instagram and other relevant public communication tools that evolve in the future.
- Altamont Free Library will actively promote the addition of individuals to the library Board of Trustees who more fully represent the diversity and lived-experiences of those in the community we serve.
- The Board of Trustees and library director will regularly take part in trustee training and essential professional development. This will include study in the areas of environmental responsibility, social equity, crisis preparedness, and economic/financial well-being, as they relate to Altamont Free Library and its commitment to our community.
  - The Executive Committee will meet every year in January to determine guidelines for that year's trainings, taking into account Board and Library operations to determine where additional trainings may be desirable for either the entire board or for the work of particular committees.

- o The Executive Committee will create and maintain a list of available training resources from the New York State Division of Library Development (DLD))- approved sources no later than April 2023.
- The director and chairs of the Sustainability, Policy, Finance, Communications & Engagement, and Buildings Committees will annually review the library's Emergency/Business Continuity Plan and report on this to the full board at its January meetings. Components of the Emergency/Business Continuity Plan will include: provisions for natural disasters and other threats to the routine operation of the library and its physical facility and digital holdings; plans for dealing with socio-political and public relations challenges; crisis communications contingency plan and other provisions for the continued operation of the library amid crisis. Recommendations for revision will be included in the board report.
- The Altamont Free Library will foster greater partnership with area businesses and organizations to enhance our mutual financial positions and work together for the betterment of our community.
  - o The Communications and Engagement committee will investigate willingness of area businesses and organizations to sponsor and promote library events and programs.
  - o The Communications and Engagement will investigate opportunities for Altamont Free Library to serve as a connector and convening place for area business owners and managers and for local business organizations. The Communications and Engagement Committee will regularly report to the full Board on their efforts.
- In its operations and activities, the Altamont Free Library will strive to reduce its consumption of energy, water and other non-renewable resources. All committee chairs will consider this when recommending initiatives and purchasing on behalf of the board and library.
  - o A resource responsibility checklist will be developed by the Sustainability Committee no later than July 1, 2023. All committee chairs will be tutored on its use in the conduct of each committee's work.
- The Altamont Free Library board of trustees and library director will review and revise, when necessary, the library's foundational documents, including:
  - o By-laws
    - The Executive and Policy committees will review the library's bylaws each January and make recommended and board-approved revisions, as necessary, throughout the year.
  - o Charter
    - The Executive Committee will reimagine Altamont Free Library's Charter, presenting this for the full board's consideration no later than December 31, 2024.
  - o Mission Statement
    - The Executive Committee will reimagine Altamont Free Library's Mission Statement, presenting this for the full board's consideration no later than December 31, 2023.
  - o General policies

- The Policy Committee will conduct a review of the library's policies on a set schedule at its monthly meetings and report on this work at the next monthly meeting of the full board. Recommendations for revision will be included in the board report.

## GOALS, OBJECTIVES AND ACTION STEPS

The following goals have been adopted as the priorities for Altamont Free Library for the coming three years:

### **GOAL #1: Altamont Free Library will expand upon and maintain a strong and sustainable financial position.**

Altamont Free Library will implement and communicate to the community a planned/memorial-giving program.

- The Communications & Engagement and Finance committees will make a study of planned and memorial giving policies, programs and practices at other libraries and community organizations to determine best practices. The committees will update the full board on their findings no later than July 1, 2024.
- A plan for memorial and planned giving will be developed and presented to the full board no later than January 1, 2025.

Altamont Free Library will ensure that its status as an Association Library is an organizational design that will allow the library to maintain its core programs and services for the coming decade.

- The Executive and Sustainability committees will undertake a systematic review of available literature and expert guidance on the topic of library sustainability in New York state, including the Division of Library Development's [Public Library District Toolkit](#). This review will include discussions with all relevant stakeholders including municipal leaders, the Upper Hudson Library System leadership, Guilderland Public Library's leadership team and major community stakeholders. The results of the review will be presented in a written report to the full Board of Trustees no later than December 2024.
- The Altamont Free Library leadership team will engage in thoughtful, well-informed, dedicated brainstorming sessions with all relevant stakeholders about the current organizational structure of Altamont Free Library and feasible alternatives.

Altamont Free Library will establish an informed financial strategy for investing and spending the library's reserve fund.



- The Finance and Policy committees will work to craft a new Reserve Fund Policy.
  - The Finance Committee will make recommendations to the full board as to the minimum allowable limits of reserve fund holdings no later than June 1, 2023. This may either be a specific dollar amount or a dynamic percentage of Altamont Free Library's annual expenses. The Finance Committee may seek outside guidance on this topic.
  - The Finance Committee will consider the creation of a dedicated bank account named Reserve Fund no later than August 1, 2023. At a minimum, the amount of money defined by the Finance Committee may be transferred into the Reserve Fund account from current holdings.
  - The Finance Committee and Policy Committee will establish guidelines for spending financial resources above and beyond the Reserve Fund. The new policy may incorporate or replace the current Investments Policy and/or Long Term Holdings Policies. The Reserve Fund Policy will be presented to the full Board no later than June 1, 2024.
- Altamont Free Library will work to ensure the long-term viability of its staffing model.
  - No later than August 1, 2023, the Personnel/Executive Committee will study the current AFL staffing model, operating hours, and employee vacation, personal, and sick time and make recommendations to the Director for inclusion in the 2024 AFL Budget.
  - No later than July 1, 2024, the Personnel/Executive Committee will make a study of the need for and viability of offering AFL employees healthcare benefits. The Personnel Committee will make recommendations to the Director and Finance Committee for consideration in the crafting of the 2025 AFL Budget.
  - No later than July 1, 2025, the Personnel/Executive Committee will make a study of the need for and viability of offering AFL employees retirement benefits. The Personnel Committee will make recommendations to the Director and Finance Committee for consideration in the crafting of the 2026 AFL Budget.

**Goal #2: Altamont Free Library will foster and expand strong community connections**

- AFL will dedicatedly expand/diversify its programming to be more inclusive, intergenerational, accessible and reflective of the needs and interests of the Altamont Free Library community.
  - The Director and staff with programming responsibilities will study the most up-to-date literature on sensory-friendly and all-ability-friendly library programming and avail themselves of training resources on that topic if needed no later than May 1, 2023.
  - The Programming Committee will review ongoing programs to study what adaptations and accommodations would be necessary to make its offerings accessible and all-age friendly. To the greatest extent possible, current programs will be made more accessible either on a permanent basis or as regularly as possible. This review will be completed no later than July 1, 2023 and implemented as soon as possible thereafter.

- The Director and Programming committees will create a checklist of accessibility considerations to be used as guidance when creating new programming and will be used as a guide when implementing new and existing programming.
- Where appropriate, AFL will partner with other libraries and community organizations to co-present all-ages and sensory-friendly programs.
- The Director along with the Programming and Communications & Engagement committees and community partners, as appropriate and available, will ensure that the accessible aspects of programs are effectively communicated.
- Altamont Free Library will foster and leverage community connections to provide more diverse and accessible programming options. The library may choose to seek support from and partnership with such institutions as sister libraries, community organizations such as churches, senior groups, Cornell Cooperative Extension, Altamont Elementary School, Guilderland and BKW school districts, village, town, county and state representatives.
- The Programming Committee will study the concept of “community as collection” to determine how it might curate and formalize this as a resource for the library community.
- Altamont Free Library will offer additional evening/weekend/virtual programs.
  - The Director and staff will continue conversations/professional learning about how to increase efforts to expand accessible programs in these regards.
- Altamont Free Library will dedicatedly work to increase community involvement with the library in such areas as programming, fundraising, volunteerism and advocacy.
  - The Communications & Engagement committee will develop and implement a plan to “show and tell” throughout the summer concert series about the good work of the library and its many offerings by July 1, 2023.
  - The Communications & Engagement committee will conduct research to determine the pros and cons of creating a formal volunteer or staff position centered on programming and community enhancement and report their findings to the full board no later than May 2024.
  - The Executive Committee and Director will annually determine the training and/or outreach needed to foster a greater understanding of the community's diverse makeup and needs.

**Goal #3: Altamont Free Library will seek new methods and improve existing methods of communicating both internally and with our community**

- To facilitate the goals and many related objectives and action items outlined in this 23-25 Long Range Plan of service, the AFL board of directors will:
  - dismantle its existing Communications Committee.
  - create a new Communications & Engagement Committee.
    - The newly formed Communications & Engagement Committee will be responsible for curating the library's public voice in print, publications, on

- the web, social media and other channels used to reach the library community. Along with the library's Director, they will work to develop initiatives to promote the library and expand engagement with its programs and offerings, and to attract new members as patrons and partners.
- The Altamont Free Library website will be redesigned to better meet the expressed needs of our community for timely news and information and accessible resources in an easily navigable format.
    - No later than July 1, 2023, the Communications & Engagement Committee will identify a web service to reimagine and assist in maintaining the AFL website.
    - No later than December 1, 2023, a study will also be made of what analytics and usage statistics will be desirable in the future with the intent to begin data collection by January 1, 2024.
  - Tools for outreach—such as contact lists—will be updated and maintained to ensure all who desire direct communication from and about the library and its offerings are receiving it regularly and in the manner they choose.
    - By September 1, 2023, the Director will present a study of existing communications lists, their use, contents and other relevant information to the Communications & Engagement Committee.
    - The Communications & Engagement Committee will study tools that may allow the public to manage their contact information and communication preferences and report their findings to the full board no later than February 1, 2024.
  - The Communications & Engagement Committee will regularly evaluate the library's available channels of communication and inform the public of the existing options.
    - Each October, the Communications & Engagement Committee will report to the full board on the state of library communications.

## **EVALUATION**

Long-range planning is a standing item on the agendas of regularly scheduled Board of Trustees meetings. This allows for reporting on the progress toward achieving the goals and objectives laid out in this report. Annually, a report on the progress made during the previous calendar year (January through December) will be prepared by the chairperson of the Sustainability Committee's long-range planning working group and library director. This will be presented to the board of trustees at its January annual meeting. These reports will be made available in paper format at the library's circulation desk. The availability of these reports will be publicized in January of each year through the library's monthly newsletter and column in the Altamont Enterprise.

In reviewing the report, the board will set an annual action plan that will be used to guide the actions and activities needed to move the library toward achieving its stated goals.

## **SUPPORTING MATERIALS**

A set of supporting documents related to the creation of the 2023-26 strategic long range plan are available, upon request, in paper format at the library's circulation desk.

## **ACKNOWLEDGEMENTS**

We would like to thank the following people who served on the Long-Range Planning Working Group: Library Director Joseph Burke, Library Trustees Christine Carpenter (chair), Deborah Marion-Katz, and Shannon Duerr. We are also grateful to Melanie Shatynski for her contributions to the LRP process as a member of the AFL Sustainability Committee, and to all the members of the 2021 through 2023 Altamont Free Library Board of Trustees.

We would like to extend heartfelt thanks to Tim Burke, director of the Upper Hudson Library System (UHLS), for his expertise, guidance, time and energy extended throughout this process.

We are additionally grateful to Altamont Reformed Church, who allowed us the use of their facilities throughout the planning process.

We would finally like to acknowledge the important contributions made by the members of our Altamont Free Library community who participated throughout the long-range planning process and shared their input, thoughtful suggestions and creative ideas. All of what you offered helped guide us in the creation of these goals and objectives. Your input, dedication and continued support of the library are what make us a rich and vibrant resource in this community. Thank you!