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LONG-RANGE PLAN

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**All artwork contained in this report is original and created by Stacey Silkey (Schultze)*

EXECUTIVE SUMMARY

The Kinderhook Memorial Library (KML) Long-Range Plan is designed to strengthen and re-solidify the Library's organizational foundation over the next three years, positioning KML for long-term sustainability, increased community impact, and continued service excellence. Already a highly valued and widely admired institution, KML is seeking to build on its many strengths while thoughtfully preparing for future opportunities and challenges.

The plan is organized around two overarching themes: Strengthen Our Foundation and Leverage Our Strengthened Foundation. The first phase focuses on clarifying governance roles and responsibilities, strengthening organizational systems and resilience, and developing a comprehensive fundraising strategy. Together, these efforts are intended to improve alignment, accountability, communication, operational continuity, and organizational capacity across Trustees, staff leadership, volunteers, and the Friends of the Library.

Building from that strengthened foundation, the second phase focuses on expanding long-term financial capacity, strengthening community partnerships and programs, enhancing outreach to underserved and underrepresented populations, and improving facilities planning and stewardship. These strategies are intended to position KML to deepen its community impact, strengthen financial sustainability, and respond effectively to evolving community needs.

While programming and patron services rarely appear as stand-alone priorities within every section of the plan, they are implicitly central throughout the entire framework. The governance, operational, fundraising, partnership, and facilities strategies identified here are all intended to support KML's ability to deliver the strongest possible programming, community engagement, and patron experience. This includes strengthening the Library's ability to reach populations that are not yet fully engaged, including underserved and underrepresented communities and the growing Spanish-speaking population, often through collaboration and partnership-based approaches.

Ultimately, this plan reflects a commitment to balancing stewardship and innovation: strengthening the systems and relationships that sustain the Library while ensuring KML remains a welcoming, responsive, and community-centered institution for years to come.

PLANNING PROCESS & SCOPE

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Over the course of three months, Kinderhook Memorial Library (KML) engaged in a comprehensive and inclusive strategic planning process designed to answer three core questions:

1. As a community library, where are we now?
2. What are we hearing from our community and stakeholders?
3. How should we evolve in the years ahead?

This process incorporated input from community members, Library leadership, staff, Trustees, and key partners.

DISCOVERY AND ENGAGEMENT

The process began with a structured discovery phase to gather broad-based input across the KML community. This included:

COMMUNITY SURVEY	TRUSTEE & FRIENDS SURVEYS	INTERVIEWS	FOCUS GROUPS
Nearly 100 community members' responses assessed usage, satisfaction, and future priorities	Stakeholders examined governance, coordination, and organizational effectiveness	Approximately 18 one-on-one interviews with Trustees, community members, and partners	A series of focus groups, including educators, parents (Family Resource Center), business/community members, the Friends of the Library, and staff

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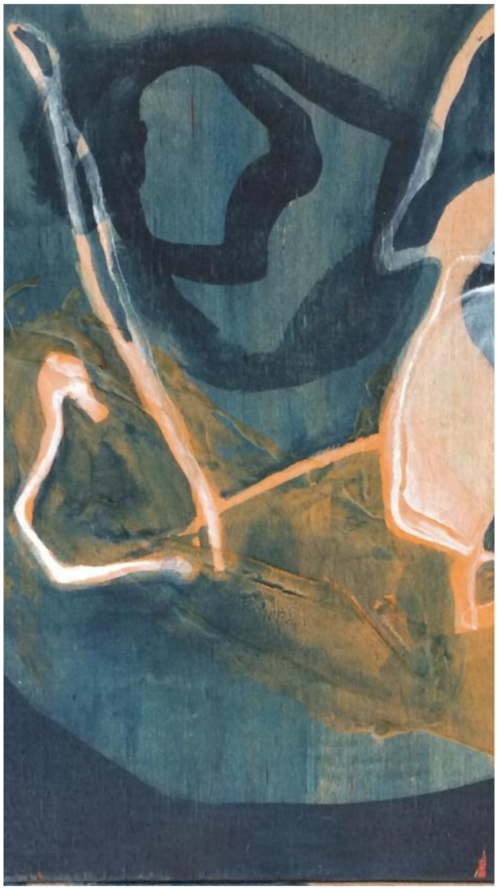
SYNTHESIS AND KEY LEARNINGS

Findings from these engagements were synthesized into a set of core themes:

- Strong perception among community members of the Library as welcoming, inclusive, and community-centered
- Staff culture and quality as a defining organizational strength
- The Library’s role as a multi-generational “third space” and community anchor
- A growing need for clarity in roles, systems, and internal coordination
- Opportunities to respond to evolving community needs through outreach, communication, and engagement

STRATEGIC FOCUS



The full Board of Trustees, together with the Strategic Planning Committee, participated in a facilitated working session to identify and prioritize key areas of focus for the next three to five years.

This included:
· A structured SWOT analysis (Strengths, Weaknesses, Opportunities, Threats)
· Prioritization exercises, including facilitated discussion and dot voting, to assess importance, feasibility, sequencing, and opportunity for early progress

PRIORITIZATION PROCESS

Consultants presented the Strategic Planning Committee with ten overarching themes that had emerged from the discovery and synthesis phases, which the Committee refined and consolidated into a more focused strategic framework. They identified two central areas of focus—strengthening the Library's internal foundation and leveraging that foundation to expand community impact—and developed three strategic actions within each.

This framework was presented to the full Board of Trustees at its April meeting, where it was discussed, refined, and formally accepted as the basis for the Library's strategic plan. In parallel, a small task group—including the Library Director and two Trustees—developed options for a refreshed mission statement aligned with the Library's evolving role and strategic direction.

This Strategic Plan report, presented to the Trustees at their May meeting, is the product of this three-month effort.

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STRATEGIC PRIORITIES

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The strategic focus of the Kinderhook Memorial Library (KML) over the next three to five years will be to strengthen and re-solidify its organizational foundation, enabling it to build long-term stability and capacity to benefit the entirety of the communities it serves. Already a strong, treasured, and widely admired community institution, KML will build on that strength and position itself for even greater impact in the years ahead.

PART I - STRENGTHEN OUR FOUNDATION

The Library's ability to expand its impact depends on a strong and well-aligned organizational foundation. By focusing first on governance clarity, internal systems, and fundraising strategy, KML will build the stability, capacity, and shared direction needed to pursue broader opportunities with confidence and effectiveness. We will pursue this through the following primary strategies:

1. CLARIFY GOVERNANCE ROLES & RESPONSIBILITIES

1.1 Clarify and Align Governance Roles, Responsibilities & Relationships

Develop and maintain a shared understanding of the roles, responsibilities, and relationships among Trustees, board officers, committees, staff leadership, and the Friends of the Library, including clear written role descriptions, communication practices, and expectations for collaboration in areas such as fundraising, programming support, and community engagement. This work should strengthen accountability, reduce duplication and gaps, and foster mutual understanding, appreciation, and interdependence across the organization.

1.2 Establish Decision-Making & Communication Protocols

Develop and implement clear protocols for how decisions are made, communicated, and documented across the board, staff leadership, and the Friends of the Library.

1.3 Enhance Board Orientation & Ongoing Development

Develop and implement a structured onboarding and ongoing development process for Trustees to ensure a shared understanding of roles, responsibilities, and effective governance practices, while also helping the board identify skills gaps, leadership needs, and opportunities for future board recruitment and succession planning.

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2. STRENGTHEN ORGANIZATIONAL SYSTEMS & RESILIENCE

2.1 Improve Documentation and Knowledge Management

Develop and maintain clear, accessible documentation of key governance, operational, and organizational processes, policies, procedures, and practices to ensure consistency, continuity, institutional memory, and ease of transition across both board and staff leadership roles, while supporting shared understanding and effective collaboration throughout the organization.

2.2 Strengthen Cross-Training, Communication & Shared Capacity

Develop and implement consistent cross-training practices, internal communication systems, and shared coordination tools to strengthen organizational resilience, transparency, and collaboration. This includes targeted skill development in core technologies and emerging tools such as artificial intelligence, reducing reliance on any single individual while fostering mutual understanding, timely information-sharing, interdependence, and shared accountability across staff and leadership.

2.3 Assess and Strengthen Operational Systems & Workflows

Review and refine core operational systems and workflows to improve efficiency, responsiveness, and alignment with organizational priorities, while supporting collaboration and shared accountability.

3. DEVELOP A COMPREHENSIVE FUNDRAISING STRATEGY

3.1 Define a Clear Fundraising Vision & Case for Support

Develop a compelling and unified case for support that clearly communicates the Library's value, impact, and future direction through strong messaging and storytelling that deepen community connection and inspire philanthropic support.

3.2 Strengthen Board & Volunteer Engagement in Fundraising

Clarify the role of Trustees and volunteers in fundraising, including expectations, training, and tools to foster confidence, participation, and shared ownership, while minimizing duplication of effort and gaps in responsibility.

3.3 Build Systems for Donor Engagement & Stewardship

Strengthen systems and practices for donor identification, cultivation, recognition, and retention to build long-term relationships and sustained support.

3.4 Establish Clear Fundraising Goals by Revenue Area

Establish realistic and measurable fundraising goals across key areas of support—including grants, annual giving, major gifts, and sponsorships—to guide planning, track progress, and ensure a balanced and sustainable revenue strategy.

3.5 Expand and Diversify Revenue Streams

Develop and implement strategies to grow major gifts, recurring giving, sponsorships, and other revenue sources to reduce reliance on any single funding stream.

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PART II - LEVERAGE OUR NEWLY STRENGTHENED FOUNDATION

With a stronger foundation in place, KML will be well-positioned to expand its reach, deepen its impact, and invest in long-term sustainability. By leveraging improved capacity and alignment, the Library can more effectively grow financial resources, strengthen community partnerships to expand relevant programming, and steward its physical assets in support of evolving community needs. We will pursue this through the following primary strategies:

4. EXPAND LONG-TERM FINANCIAL CAPACITY

4.1 Strengthen Sustainability Through Endowment, Reserves & Planned Giving

Develop and implement coordinated strategies to grow and steward the Library's endowment, funding reserves, and planned giving program, ensuring stable, flexible, and sustainable sources of long-term financial support while encouraging philanthropic commitments that strengthen the Library's future financial security.

4.2 Align Financial Planning with Strategic Priorities

Integrate long-term financial planning with strategic goals to ensure resources are allocated effectively and support sustained impact over time.

4.3 Strengthen Financial Oversight and Transparency

Enhance financial reporting and oversight practices to support informed decision-making, build trust, and ensure responsible stewardship of resources.

4.4 Improve Cost Efficiency Through Strategic Partnerships

Identify and pursue opportunities to reduce the growth of operating costs through shared services, coordinated purchasing, and other efficiencies developed in partnership with peer organizations.

5. STRENGTHEN COMMUNITY PARTNERSHIPS

5.1 Identify and Prioritize Strategic Partnerships & Programming

Identify and prioritize partnerships with schools, neighboring libraries, community organizations, civic institutions, and other partners that align with KML's mission and expand its reach and impact. Particular attention should be given to strengthening relationships with underserved and underrepresented populations, including the growing Spanish-speaking community and individuals who do not currently see themselves as Library users, while continuing to explore opportunities for greater collaboration, strategic alignment, shared services, and coordinated efforts with peer institutions such as the Valatie Free Library.

5.2 Deepen Partnerships Through Collaboration & Shared Initiatives

Strengthen relationships with priority partners through regular communication, active listening, shared planning, and the development of collaborative programs and initiatives that leverage shared resources, increase participation, and enhance community impact and mutual benefit.

5.3 Expand Outreach to Underserved & Underrepresented Communities

Develop targeted marketing, engagement strategies, and partnerships to better connect with populations that are not currently well-served or fully engaged by the Library, strengthening access, inclusivity, community relevance, and long-term community connection.

6. STRENGTHEN BUILDING MAINTENANCE & FACILITIES PLANNING

6.1 Strengthen Facilities Assessment & Long-Term Capital Planning

Assess the condition, capacity, and functionality of the Library's building and grounds to refine understanding of maintenance needs, space constraints, and opportunities for improvement, and use this work to further develop and implement a multi-year facilities and capital plan that prioritizes maintenance, repairs, and potential upgrades aligned with the Library's strategic goals and evolving community needs.

6.2 Establish Ongoing Maintenance & Stewardship Practices

Implement regular maintenance schedules with periodic assessments and clear responsibilities to ensure the building remains safe, welcoming, and well-maintained over time.

6.3 Evaluate Opportunities to Enhance Space Utilization & Accessibility

Explore ways to improve how space is used, including opportunities to increase flexibility, accessibility, and the Library's ability to support programming and community use.

6.4 Explore Creative Approaches to Facilities Management

Identify and pursue cost-effective and innovative approaches to facilities maintenance and management, including opportunities for shared services, fractional staffing, and strategic partnerships.

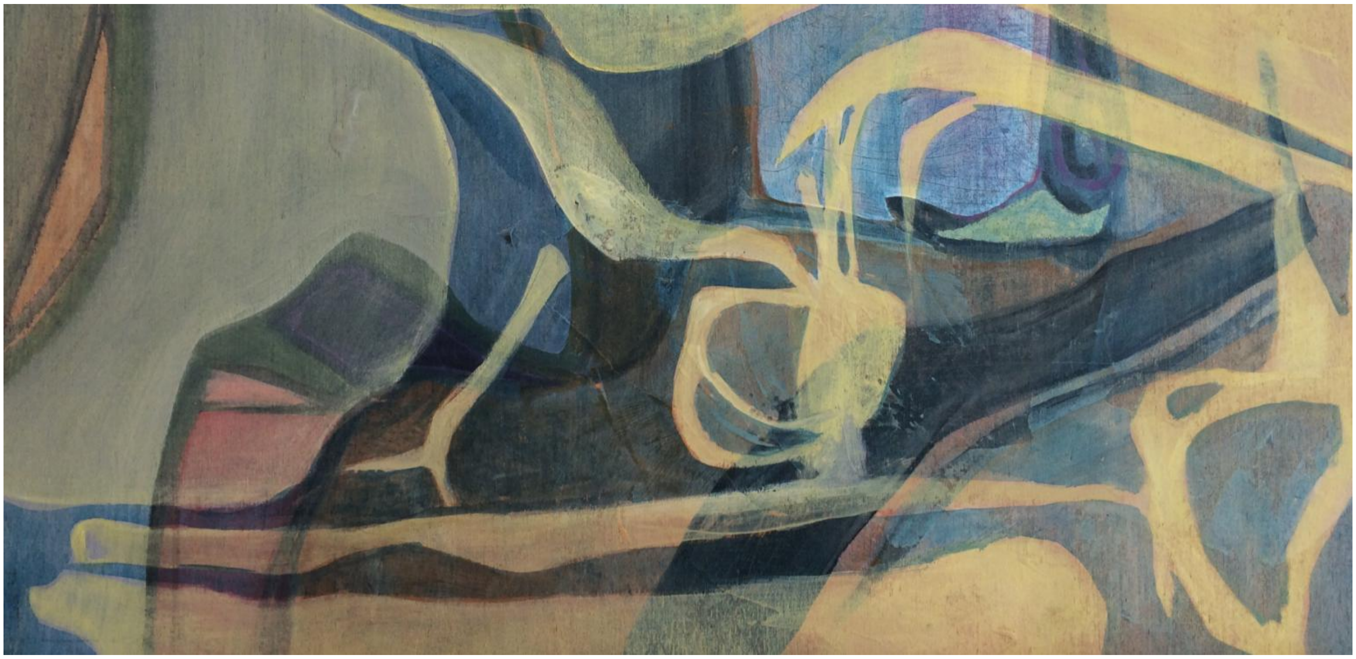
PROGRAMMING NOTE

In addition to strengthening its internal foundation, the Library has a meaningful opportunity to expand its reach to populations that are not yet fully engaged. This will be accomplished not through internally developed program expansion alone, but through targeted outreach and partnerships that enable the Library to understand better, connect with, and serve these groups. Programming will continue to evolve as a key expression of this work, particularly when developed collaboratively with trusted community partners.

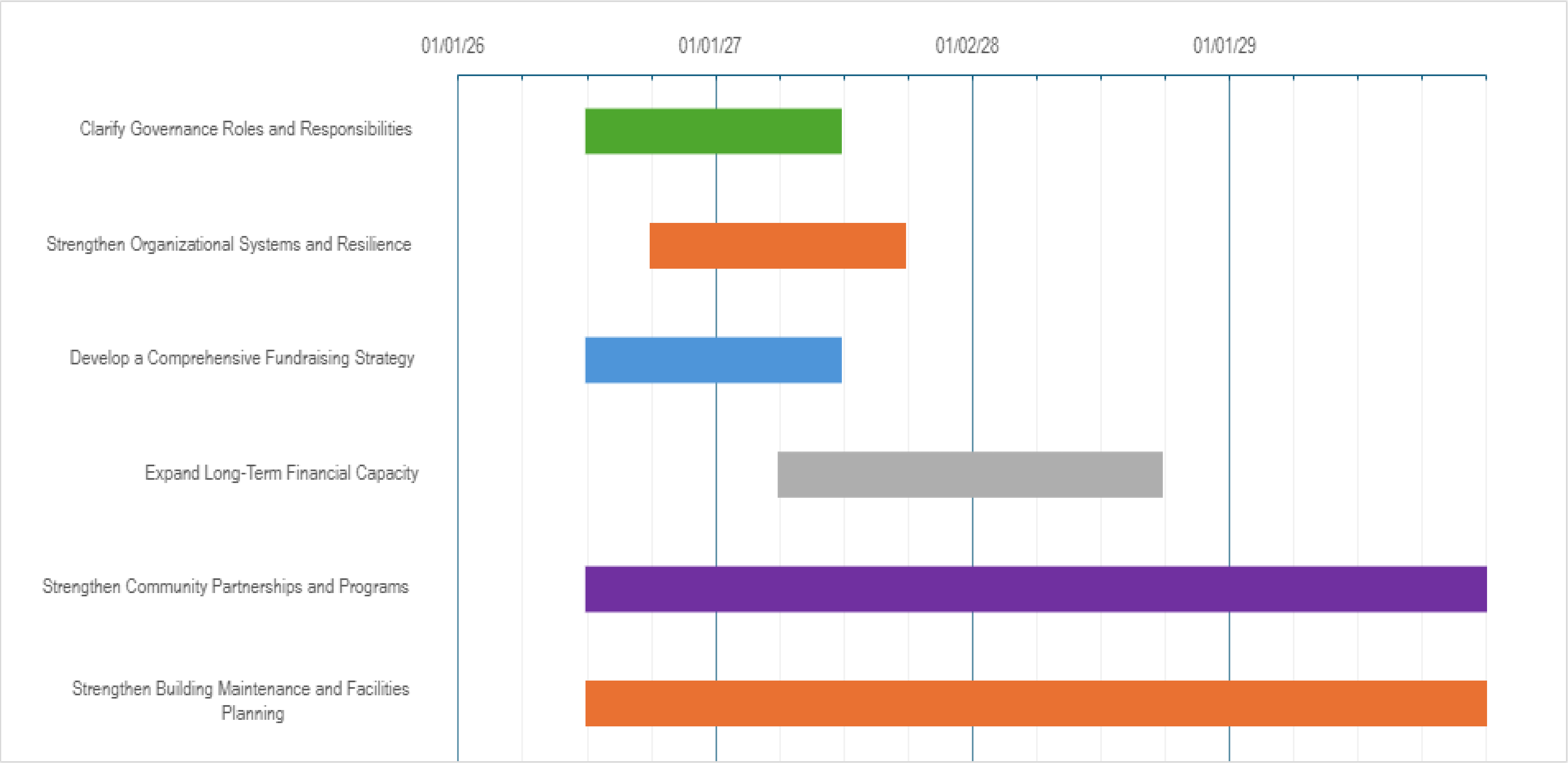
COMMITTEE ROLES & NAMING ALIGNMENT

As a result of this strategic planning process, several Board committees may be renamed and/or refined to better reflect their evolving responsibilities and areas of focus within the Library's organizational structure. These changes are intended to improve clarity, alignment, and accountability while ensuring that committee titles and responsibilities accurately reflect the strategic priorities, governance practices, and operational needs identified through this planning effort.

This includes renaming the Fundraising Committee as the Development Committee to reflect a broader focus on fundraising strategy, donor engagement, stewardship, and long-term financial development, as well as renaming the Nominating Committee as the Governance Committee to better capture its expanded role in board development, governance practices, orientation, succession planning, and organizational alignment.



IMPLEMENTATION TIMELINE



KML RESPONSIBLE, ACCOUNTABLE, COUNSULTED & INFORMED (RACI) MATRIX

Kinderhook Memorial Library Long-Range Plan – Tentative RACI Matrix

Action Step	Description	Responsible (R)	Accountable (A)	Consulted (C)	Informed (I)
Clarify Governance Roles and Responsibilities					
1.1	Clarify and align governance roles, responsibilities, and relationships	Governance Committee	Board of Trustees	Director; Friends Leadership	Staff
1.2	Establish decision-making and communication protocols	Governance Committee	Board of Trustees	Director; Staff	Friends
1.3	Enhance board orientation and ongoing development	Governance Committee	Board of Trustees	Director	Friends; Staff
Strengthen Organizational Systems and Resilience					
2.1	Improve documentation and knowledge management	Director; Staff Leadership	Board President	Board	Friends
2.2	Strengthen cross-training, communication, and shared capacity	Director; Staff Leadership	Director	Board Chair	Board
2.3	Assess and strengthen operational systems and workflows	Director; Staff Leadership	Board President	Board	Friends
Develop a Comprehensive Fundraising Strategy					
3.1	Define a clear fundraising vision and case for support	Development Committee	Board of Trustees	Director; Donors	Staff, Friends
3.2	Strengthen board and volunteer engagement in fundraising	Development Committee	Board of Trustees	Board Leadership, Friends	Staff
3.3	Build systems for donor engagement and stewardship	Development Committee	Board of Trustees	Director; Friends	Staff
3.4	Establish clear fundraising goals by revenue area	Development Committee	Board of Trustees	Director, Friends	Staff
3.5	Expand and diversify revenue streams	Development Committee	Board of Trustees	Director	Staff
Expand Long-Term Financial Capacity					
4.1	Strengthen sustainability through endowment, reserves, and planned	Development Committee	Board of Trustees	Financial Advisors; Legal/Estate Planning	Staff
4.2	Align financial planning with strategic priorities	Board Treasurer; Director	Board of Trustees	Staff Leadership	Friends
4.3	Strengthen financial oversight and transparency	Board Treasurer; Finance Committee	Board of Trustees	Director	Staff
4.4	Improve cost efficiency through strategic partnerships	Director; Board President	Board of Trustees	Staff Leadership	Friends
Strengthen Community Partnerships					
5.1	Identify and prioritize strategic partnerships and programming	Director	Board of Trustees	Staff Leadership; Board	Friends
5.2	Deepen partnerships through collaboration and shared initiatives	Director	Director	Community Partners; Friends	Board
5.3	Expand outreach to underserved and underrepresented communities	Director	Director	Community Partners	Board
Strengthen Building Maintenance and Facilities Planning					
6.1	Strengthen facilities assessment and long-term capital planning	Facilities Committee; Treasurer	Board of Trustees	Director; External Experts	Staff; Friends
6.2	Establish ongoing maintenance and stewardship practices	Facilities Committee, Director	Director, Staff	Staff Leadership	Board
6.3	Evaluate opportunities to enhance space utilization and accessibility	Director, Staff	Board of Trustees	Board; Staff	Friends
6.4	Explore creative approaches to facilities management	Director	Board of Trustees	Partner Organizations	Staff

LONG-RANGE PLAN IMPLEMENTATION FRAMEWORK

PART I - STRENGTHEN OUR FOUNDATION

1. Clarify Governance Roles and Responsibilities

Action Step	Resources Needed	Lead	Progress Metrics
1.1 Clarify and align governance roles, responsibilities, and relationships	Governance Committee; peer library examples; governance templates; facilitated discussions	Governance Committee	Clear governance roles documented and consistently applied
1.2 Establish decision-making and communication protocols	Governance Committee; consultant guidance (as needed); board/staff input	Governance Committee	Protocols documented and consistently applied
1.3 Enhance board orientation and ongoing development	Governance Committee; onboarding materials; training resources	Governance Committee	Structured onboarding process implemented; orientation handbook developed and used; skills gaps and leadership needs regularly assessed; tracking systems in place

2. Strengthen Organizational Systems and Resilience

Action Step	Resources Needed	Lead	Progress Metrics
2.1 Improve documentation and knowledge management	Staff time; board input; shared document systems; policy templates	Executive Director / Board Chair	Core organizational and governance documents completed and accessible, including bylaws and core policies
2.2 Strengthen cross-training, communication, and shared capacity	Staff time; internal knowledge sharing; communication and coordination tools	Executive Director	Critical functions shared across staff; communication systems consistently utilized; assessment systems in place
2.3 Assess and strengthen operational systems and workflows	Staff and board input; process review tools	Executive Director / Board Chair	Operational and governance workflows documented, reviewed, and improved

3. Develop a Comprehensive Fundraising Strategy. *This work will likely require targeted external support to supplement internal capacity and expertise.*

Action Step	Resources Needed	Lead	Progress Metrics
3.1 Define a clear fundraising vision and case for support	Development Committee; communications support; donor and community input	Development Committee	Case for support approved and actively used
3.2 Strengthen board and volunteer engagement in fundraising	Development Committee; training resources; board leadership	Development Committee	Clear fundraising roles and expectations documented; systems in place for annual training of board, Friends and staff; annual MOU w. Friends
3.3 Build systems for donor engagement and stewardship	CRM tools; staff and volunteer time	Development Committee	Donor engagement and stewardship systems established and utilized
3.4 Establish clear fundraising goals by revenue area	Financial data; planning tools	Development Committee	Fundraising plan approved with regular tracking and reporting practices
3.5 Expand and diversify revenue streams	Board and staff input; financial analysis	Development Committee	New and diversified revenue opportunities identified and actively pursued

PART II - LEVERAGE OUR STRENGTHENED FOUNDATION

4. Expand Long-Term Financial Capacity

Action Step	Resources Needed	Lead	Progress Metrics
4.1 Strengthen sustainability through endowment, reserves, and planned giving	Board leadership; Development Committee; financial and estate planning advisors	Board Chair / Development Committee	Endowment, reserve, and planned giving strategies in place
4.2 Align financial planning with strategic priorities	Board and staff leadership; planning tools	Board Treasurer / Executive Director	Financial planning activities aligned with strategic priorities
4.3 Strengthen financial oversight and transparency	Board Treasurer; Finance Committee	Board Treasurer	Clear financial reporting and oversight practices in place
4.4 Improve cost efficiency through strategic partnerships	Board and staff input; partnerships	Executive Director / Board Chair	Cost-saving opportunities jointly identified and implemented

5. Strengthen Community Partnerships and Programs

Action Step	Resources Needed	Lead	Progress Metrics
5.1 Identify and prioritize strategic partnerships and programming	Staff leadership; board input; community outreach	Executive Director	Priority partnerships and program opportunities with robust stakeholder input, potentially through a program advisory group
5.2 Deepen partnerships through collaboration and shared initiatives	Staff time; partner coordination; collaborative planning	Executive Director	Collaborative initiatives and programs implemented with community partners
5.3 Expand outreach to underserved and underrepresented communities	Marketing tools; outreach strategies; community partnerships	Executive Director	Data demonstrating increased engagement among key underserved and underrepresented populations

6. Strengthen Building Maintenance and Facilities Planning

Action Step	Resources Needed	Lead	Progress Metrics
6.1 Strengthen facilities assessment and long-term capital planning	Facilities Committee; external expertise; financial planning resources	Building & Grounds Committee / Treasurer	Updated facilities assessment and long-term capital priorities established
6.2 Establish ongoing maintenance and stewardship practices	Staff leadership; maintenance schedules and systems	Executive Director	Maintenance and stewardship practices consistently implemented
6.3 Evaluate opportunities to enhance space utilization and accessibility	Staff and board input; accessibility guidance	Executive Director	Space utilization and accessibility improvement opportunities identified
6.4 Explore creative approaches to facilities management	Staff leadership; community and organizational partnerships	Executive Director	Innovative and cost-effective facilities approaches explored and piloted