Proposal to San Benito County Free Library

in response to RFP for Library Needs Assessment
for San Benito County Free Library and TEL Center

Due June 3, 2016 at 5:00 p.m.

library systems & services

2600 Tower Oaks Blvd.
Suite 510
Rockville, MD 20852

800.638.8725
www.lsslibraries.com

Proposal Pricing and Cost Structure

LS&S is delighted to be considered for this important project. The total proposal price, including expenses, for the Needs Assessment is $15,000. As outlined in the proposal, this includes on-site visits during Phase 1, 2, and 3 of the project, an extensive depth of professional expertise and exceptional value for the services to be performed.

Phase 1: $3,000

Phase 1	Tasks / Activities
	• Review of timeline / milestones with county and project leadership • Finalize Key Community Stakeholder List • Review & approve surveys • Schedule focus groups and one-on-one sessions • Discuss preparation data upload needs from ILS system for community analytics assessment
	Review community documentation and enhance understanding of long term key goals, objectives and activities — as based on municipal and community visioning activities

Phase 2: $7,500

Phase 2	Tasks / Activities
	• County leadership focus groups • Library staff and friends focus groups • Web-based survey (4 week period) • Technology assessment • Space planning assessment • Library collection & services assessment
	Conduct data upload and community analytics assessment

Phase 3: $4,500

Phase 2	Tasks / Activities
	Review data and project input and develop draft of Needs Assessment
	Provide needs assessment draft report to county leadership
	Prepare final updates to plan
	Present needs assessment final report to county leadership

Total: $15,000

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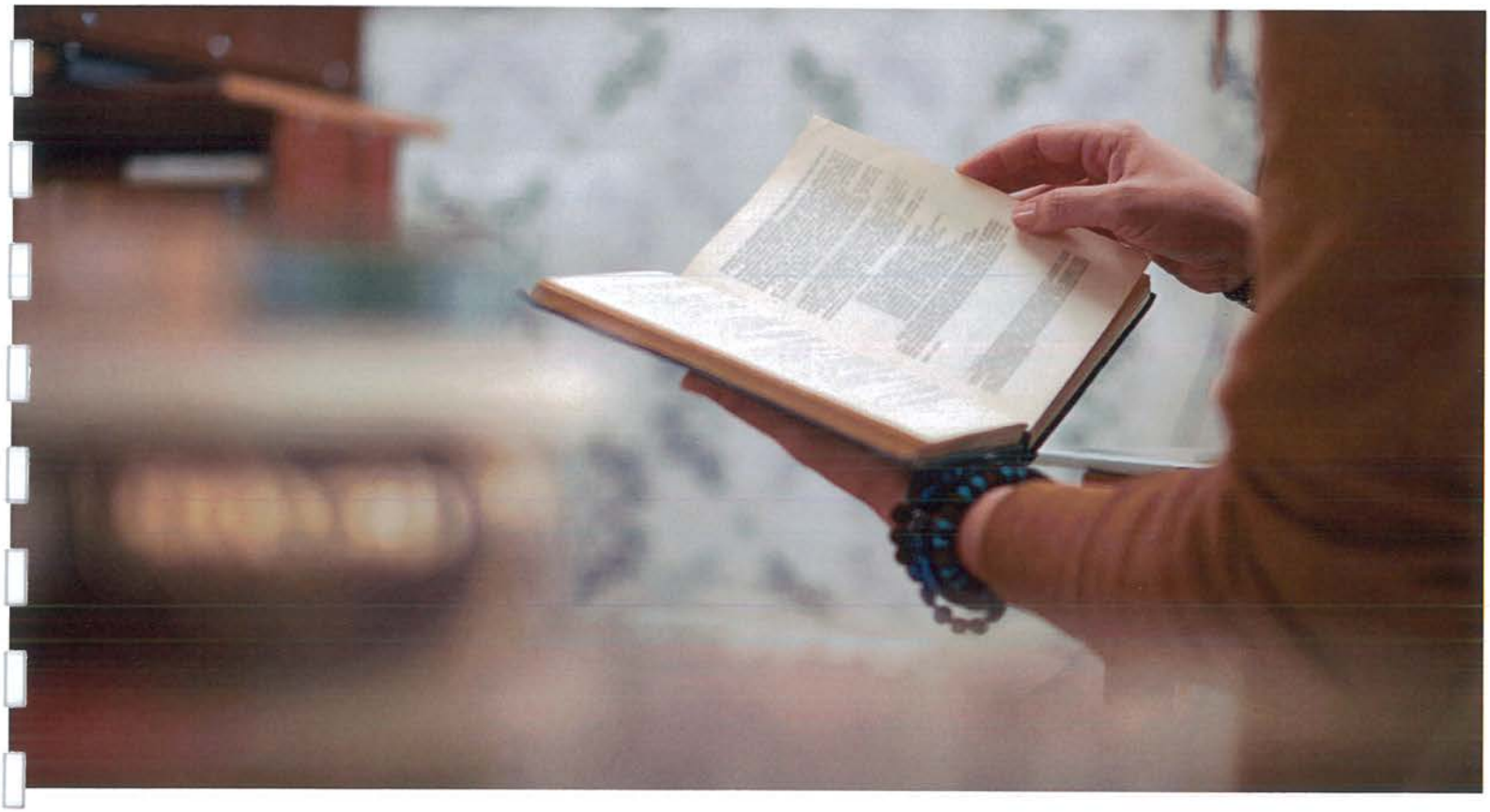


Introduction

San Benito County
County Administrative Office
481 4th Street
Hollister, California 95023

Library Systems & Services, LLC (LS&S) welcomes the opportunity to respond to your Request for Proposal (RFP) for a Library Needs Assessment for the San Benito County Free Library and TEL Center.

The San Benito County Intergovernmental Committee has wisely chosen to seek the services of a consultant to assess all aspects of the current library and educational needs and to anticipate the future needs. Many goals of the proposed project have been detailed in the RFP, and we at LS&S have reviewed them carefully before preparing our response. We have addressed the requirements and take no exception to them.

In authorizing the needs assessment, the San Benito County Board of Supervisors proposed the construction of a beautiful new library and community center that would become a model for the state. This interactive place for a variety of activities will facilitate education while building a sense of community. We understand—based on your RFP—that San Benito County's primary parameters for the needs assessment process are framed by the following statements:

1. **Develop a comprehensive analysis of the unmet facility and operation needs in the existing library**
2. **Identify the needs (capital and operational) for a Technology Education and Library Center (TEL), a future center that would serve as a hub for the entire community**

The data and conclusions of the assessment will help lead the county to a comprehensive understanding of operational and building needs with a focus on educational, technology and community requirements. The necessary step will form the foundation for a plan that incorporates the county's vision and mission for both the San Benito County Free Library and eventually a Technology, Education, and Library (TEL) Center:

> **An information and culturally-rich, healthy, and economically vibrant San Benito County, where residents are inspired to imagine and prepare for the future together. The San Benito County Free Library provides the community lifelong learning opportunities. The library delivers responsive informational, educational, recreational, and cultural library services within a welcoming environment.**

Introduction (cont.)

To accommodate both objectives of the mission, the assessment will examine:

- **Expansion of library collections including digital resources**
- **Considerations for raising literacy and school standardized test scores**
- **Access to digital literacy and technology for residents aged 0-5, school-age children, teens and adults**
- **Physical library design and location that accommodates 21st century needs in technology, education, information, and recreation; this will not only serve library programs, but literacy needs, and other community needs (i.e. conference rooms, and commercial space)**
- **Ability to include non-profit, private, and/or commercial sector economic stimulus**
- **Ability to incorporate public-private partnerships in order to lower costs, increase services, and remain relevant to users of all ages and demographics.**

We understand the importance of this assessment since existing library facility and service levels are inadequate to accommodate both present and future needs. Achieving both short- and long-term community goals—including involvement with schools and businesses—depends on this updated assessment. It's the most practical way to enhance opportunities for volunteerism, employment, and a modern library experience with the latest educational, recreational, and technological activities for patrons of all ages.

Thank you for your consideration of this proposal.

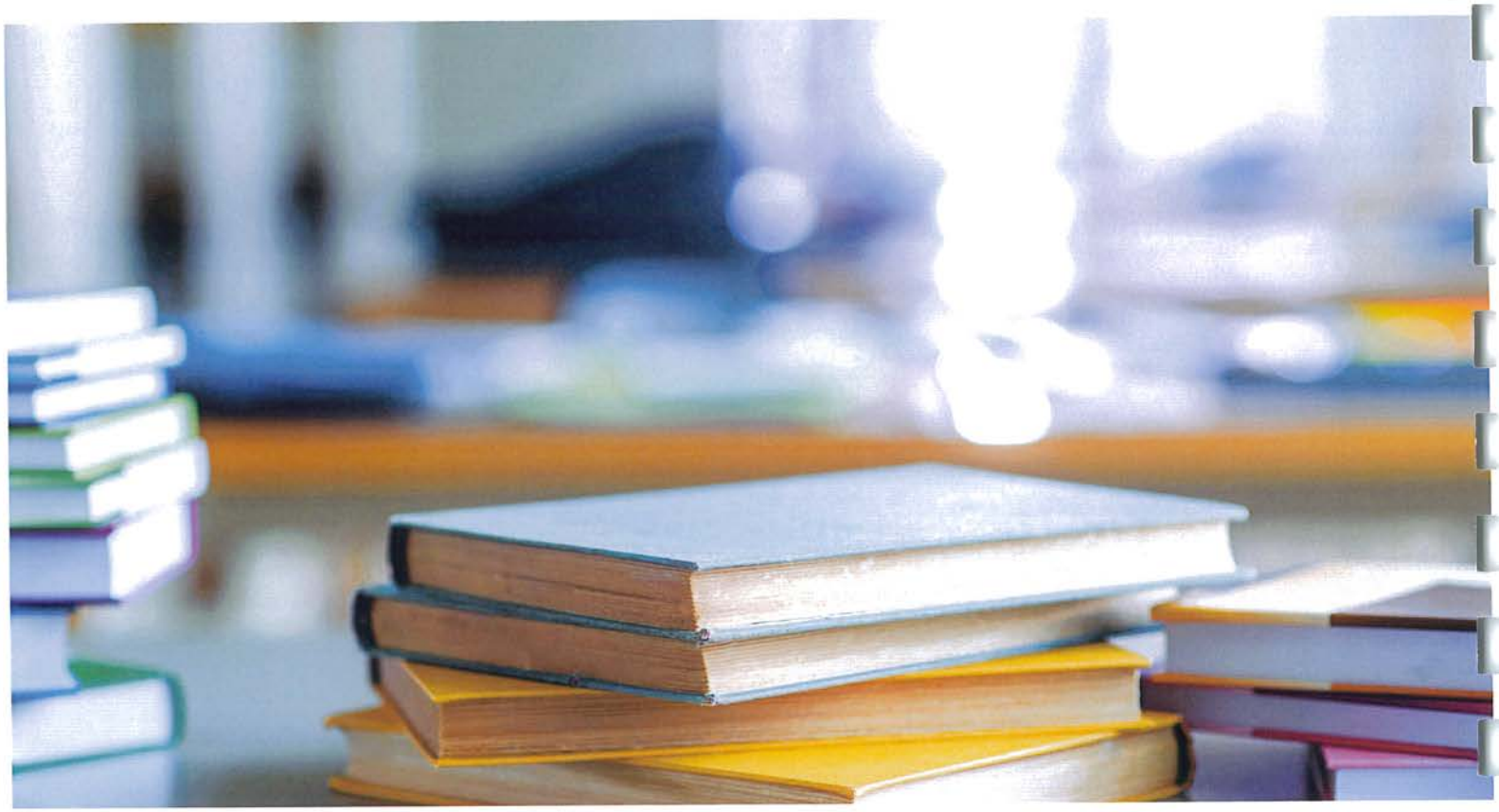
Sincerely,

Paul Colangelo

President and COO

Firm Name and Contact Information

Firm Name:	Library Systems & Services
Address:	2600 Tower Oaks Boulevard, Suite 510 Rockville, Maryland 20852
Contact:	Robert Windrow, Vice President
Telephone:	(301) 526-6822
Email:	bob.windrow@lsslibraries.com



LS&S Background & Qualifications

Since its founding in 1981 by library professionals, LS&S has developed and applies best business practices to library management and operations. We remain the only company in the U.S. with the specialty of managing public libraries in partnership with local governments.

Headquartered in Rockville, Maryland and with substantial operations in California, the company employs more than 1,000 in 80+ locations. More than 14% of these employees are professional librarians with MLS degrees from ALA-accredited library schools. Overall, LS&S staff cover every position necessary in libraries. These include automation librarians, computer programmers, network administrators, graphic designers, and systems experts with insight and the capability to guide, assist, and perform any library automation and processing task.

These professionals bring decades of expertise in all aspects of management and operations including:

- Planning
- Budgeting
- Automation
- Facilities development and management
- Space utilization
- Programming
- Service delivery
- Collection assessment
- Grant-writing and fundraising
- Advocacy
- Marketing

LS&S has consistently been in the forefront of library technological advances, and has on many occasions led the industry. For example, LS&S was the first company to use minicomputers for library cataloging, the first to master library data on optical disk, the first to use and understand the impact of CD-ROM technology, and the first to develop and deploy kiosks for remote access to collections and services. With this unparalleled background LS&S is in a position to examine how a library system handles essential functions such as data storage and IT infrastructure.

As consultants, LS&S takes an analytical approach when assessing the library and technology needs of a community. We understand the technological, educational, and civic goals of the community and use them as a framework for drafting plans and programs that advance priorities. We assess physical space, from shelving and layout to structure and staff coverage. We also look for opportunities to improve the user experience because our ultimate goal is to make a library's services helpful, intuitive, and welcoming for everyone who visits.

Other aspects of the LS&S background that can get folded into the assessment include a review of operations and processes for programming, materials, staffing and budgets; LS&S often finds significant savings opportunities in a library system's expenditures.

In 1997, LS&S won a contract to operate and manage the Riverside County, California Library System, consisting of 24 library branches and one bookmobile. We continue to operate this system that now has 35 branches, two bookmobiles, and a museum. We also operate five other county-wide library systems: Shasta County, California; Finney County, Kansas; Osceola County, Florida; Sumter County, Florida; and Jackson County, Oregon.

LS&S Background & Qualifications (cont.)

In addition, LS&S operates individual libraries for these cities:

- Camarillo, California
- Moreno Valley, California
- Palmdale, California
- Santa Clarita, California
- Simi Valley, California
- Upland, California
- Moorpark, California
- Germantown, Tennessee
- Arlington, Tennessee
- Millington, Tennessee
- Collegedale, Tennessee
- Red Oak, Texas
- Leander, Texas
- Farmers Branch, Texas

A frequent request from these customers is for LS&S to conduct needs assessments and develop long-range strategic plans. These help the libraries anticipate future requirements and provide strategies on how to meet them. Included in Appendix A are examples of these projects from Riverside County and Arlington, Tennessee.

LS&S also has a niche focus in establishing newly independent libraries as strong, fiscally-responsible organizations with a view to a future with additional branch facilities. Part of this includes paying particular attention to ensuring that libraries reflect the information needs and aims of the community, local government and library users.

In Red Oak, Texas, the town turned to LS&S for consulting services when it needed to establish the town's first public library. LS&S helped set up the facility, built and arranged the collection and established a library advisory board. Ongoing contact with community leaders, library boards, county boards of supervisors and other library support groups identify needs in each location. In a sense, there is an informal, continuous assessment of needs taking place by our employees to ensure our services meet the particular needs of the community.

Project Staffing

LS&S proposes a team solution to address your strategic planning needs. Our team members' qualifications, background, and professional experience are well suited to working collaboratively with the San Benito County's leadership and membership.

The following members of the LS&S management team will lead the effort (full resumes are included in Appendix B of this proposal):

- **Dana Braccia. LS&S Vice President of Library Services, Dana holds a bachelor's degree in marketing from Arizona State University and an MLS degree from the University of Arizona. She has taught library marketing at the University of Arizona, the University of Kentucky, and the University of Tennessee. She has experience with library construction, remodels and service redesigns. She has been a member of the management team since 2013.**

- **Barbara Howison. LS&S Regional Director for Western Operations, Barbara holds a bachelor's degree from California State University and an MLS degree from the University of Southern California. She also studied Planning & Design of Public Libraries at the Harvard University Graduate School of Design. Barbara has managed groups of libraries for LS&S since 1997 and has led strategic planning, budgeting, green design and other activities. She has been involved with 20 library building projects and is an expert in library building trends. She is trained in library building planning software, Libris Design.**

Both Dana and Barbara have extensive experience in working with groups to collect data. Dana's teaching experience has been especially helpful in collaborating with school superintendents and others in the academic field. And Barbara's experience in planning for library construction, renovation and space planning is an asset.

LS&S will conduct all service areas assessments, key participant interviews, focus group sessions, and web-based surveys. The project will use CivicTechnologies, an outside analytics firm, to provide additional support for the Lifestyle Characteristic & Demographic Assessment. CivicTechnologies provides the software for demographic and mapping technologies.

Scope of Work

We have divided this project into three phases described below and outlined in Table A.

Phase One

Starting with an in-person kickoff meeting, we will review San Benito County's current and long-term goals and strategies, and understand your vision. We will review a Timeline & Milestones schedule with county and project leadership, confirm on-site meeting dates, finalize the Key Community Stakeholders List, and discuss preparation for data uploads from the ILS system for a community analytics assessment. We also will conduct a high-level SWOT analysis.

Phase Two

We will collect and analyze data and opinions. This includes environmental scans through surveys, an assessment of library data and statistics, and demographic and market segmentation analysis. Using a mix of interviews, focus groups and web-based surveys, we will gather input from county leadership, the general community and other key stakeholders as appropriate. We also will conduct an in-depth community Lifestyle Characteristic & Demographic Assessment with the support of CivicTechnologies software.

Moreover, we will conduct a space planning assessment, collection & services assessment, and technology assessment. Appendix C shows the subject areas that can be included in our library technology assessment. Not every area is applicable to San Benito County, but in general our review will include:

- **Hardware and software deployed**
- **Network and LAN infrastructure**
- **Wireless infrastructure**
- **Security**
- **Library management systems (ILS/LMS)**
- **Patron computer environment**
- **Staff computer environment**
- **Printers and copiers**
- **Self-check environment**
- **Internet**

Phase Three

Realizing that a building approval and construction project of this type takes a considerable amount of time to reach completion, we would recommend that in the interim as many of these goals as possible be included in the plans for the existing facility.

We plan to include time for scheduling, inviting, organizing and moderating at least three community outreach and stakeholders meetings. During these meetings we will gather input from county library staff, county administration staff, Friends of the Library, and other library partners. In addition, we will prepare and present weekly progress reports to the Intergovernmental Committee and county administration.

We will prepare a series of documents for review, updating, and final approval by the county's leadership team.

Scope of Work (cont.)

The table below shows the proposed phases, key tasks and activities as well as a timeline by week. The total elapsed time estimate is 15 weeks. If project commencement is early August, a project completion date is expected by the end of November.

Table A - Timeline & Milestones

Phase	Tasks / Activities	Proposed Timeline	Virtual / In-Person / Research
1	• Review of timeline/milestones with county and project leadership • Finalize Key Community Stakeholder List • Review & approve surveys • Schedule focus groups and one-on-one sessions • Discuss preparation data upload needs from ILS system for community analytics assessment	Weeks 1 - 4	In-Person / Virtual * We will have an in-person kick-off meeting with county and project leadership
1	Review community documentation and enhance understanding of long-term goals and strategies	Weeks 1 - 4	Research
2	• County leadership focus groups • Library staff and friends focus groups • Web-based survey (4 week period) • Technology assessment • Space planning assessment • Library collection & services assessment	Weeks 5 - 10	In-Person / Virtual * The in-person activities will be conducted over a 3-day period based on participant availability
2	Conduct data upload and community analytics assessment	Weeks 6 - 10	Virtual
3	Review data and project input and develop draft of needs assessment	Weeks 10 - 12	Research
3	Provide needs assessment draft report to county leadership	Week 13	Virtual
3	Prepare final updates to plan	Week 14	Research
3	Present needs assessment final report to county leadership	Week 15	In-Person

Deliverables

In collaboration with San Benito County's leadership, the proposed needs assessment will identify gaps between the county's current state of operations and its aspirations with an in-depth Current Assessment & Recommendation Guide for these four components:

1. **Library space & high-level facility plan**
2. **Library collection & services**
3. **Library technology**
4. **Library community engagement**

Both weekly reports and a final report will be delivered to the Intergovernmental Committee and county administration. Included in the reports will be the information gained in meetings with the administration, superintendent of schools, district superintendents, Youth Alliance, LULAC, First Five, and other groups. We will detail the ways in which the community's current library services may not fulfill the citizens' needs, as well as the current services that are considered adequate or better. Based on our experience and the county's criteria, we will determine whether the usage levels of various services and facilities are considered adequate in view of the demographics and values of the area.

The community's interest in additional space or the construction of a new TEL Center will be evaluated, and service limitations will be identified in the reports. All aspects of library services will be analyzed:

- **Collections**
- **Seating**
- **Technology**
- **Office space**
- **Special purpose areas**
- **Supervisory space**
- **Structural integrity**
- **Energy usage**
- **Health and safety**
- **Access for the disabled**
- **Parking**

Findings will appear in the reports, along with identification of services that could be offered if different or additional space were available.

Financial impacts of all recommendations to meet currently unmet needs will be described in the reports, whether for additional space, a TEL Center, or other programs or services. The final report will summarize all methodology, findings and recommendations for current and future San Benito County Free Library services and provide an outline for activities, services, and design of a TEL Center to meet future needs.

All data collected will be submitted with the final report, which will include an executive summary and copies of all surveys or questionnaires used in its development. It will be provided in electronic and paper copy, with exhibits for materials used in compiling the results.

Cost Structure

Please see "Envelope B" for our detailed cost proposal.

References

Riverside County Library System
Suzanne Holland, Assistant Director
County of Riverside Economic Development Agency
3403 10th Street, Riverside, California 92501
(951) 955-6685

Osceola County Library System
David Barnett, Library Contract Manager
Osceola County, Florida
(407) 742-8800
David.Barnett@osceola.org

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Arlington Strategic Plan

Arlington Public Library New Facility Project
Construction Cost Estimates
February 3, 2016 | Library Systems & Services, LLC

Population Growth and Library Size

Published population growth projections for the Town of Arlington have been as high as 32,000* by 2020. However, a conversation with the Town Administrator indicates that those numbers were pre-recession estimates, and that the Town does not currently expect growth on that scale. Recommendations in this report are based on current trends, which suggest 20,000-22,000 by 2020 as the estimated population for Arlington. Current population as of July 1, 2015 was 12,807.
*https://www.shelbycountytn.gov/DocumentCenter/Home/View/661

The State Library of Tennessee issued new library standards* in 2014. Non-metropolitan independent public libraries are ranked by population served into four Levels:

I. Under 5,000
II. 5,000-9,999
III. 10,000-24,999
IV. 50,000-300,000
* http://share.tn.gov/tsla/lps/Library%20Standards%20for%20Non-Metropolitan%20Libraries.pdf

It's likely that Arlington will remain Level III in the next 7-10 years. The section in the Tennessee State Library Standards pertaining to Facilities indicates the minimum standard for a Level III library is *2,500 sq. ft. or 0.5 sq. ft. per capita, whichever is larger*. According to this standard, the minimum requirement for a new Level III library would be 10,000 square feet.

However, recent library building projects, such as the one in 2014 in Montana's ImagineIF Libraries (formerly Flathead County Library System), assert that the general rule of thumb for new library construction for the past 15 years has been 1.0 square foot per capita...and the tendency has been to make them ever larger to accommodate additional technology and meeting spaces required by the community. Therefore, 20,000 square feet is the minimum size we recommend for a new library facility in Arlington.

Estimated Construction Costs

Final construction costs will vary depending on the site selected, local construction codes, labor costs, furniture, fixtures and equipment, and many other factors. Two recent public library construction projects* completed between July 1, 2014, and June 30, 2015 in Tennessee, reported their total Cost per SF as $292 (Antioch) and $333.48 (Nashville) for 25,000 and 24,580 square foot libraries respectively.
* http://lj.libraryjournal.com/2015/11/buildings/year-in-architecture-2015-public-library-data

RS Means construction cost data for Memphis-area construction projects (2013) provides the following example of construction cost breakdowns:

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Arlington Strategic Plan

Construction Cost Estimates for Library in Memphis, Tennessee

The following analysis estimates the cost to build a **library** for Memphis, Tennessee. Costs are derived from a building model that assumes basic components for a 22,000 square foot building (2 storey).

Library Square Foot Cost Assuming Face Brick with Concrete Block Back-up/Reinforced Concrete Frame

Cost Estimate (Union Labor)	% of Total	Cost Per SF	Cost
Total		$101.33	$2,229,300
Contractor Fees (GC, Overhead, Profit)	25%	$25.33	$557,300
Architectural Fees	8%	$10.13	$222,900
Total Building Cost		$136.80	$3,009,600
Cost Estimate (Open Shop)	% of Total	Cost Per SF	Cost
Total		$92.07	$2,025,400
Contractor Fees (GC, Overhead, Profit)	25%	$23.02	$506,400
Architectural Fees	8%	$9.21	$202,500
Total Building Cost		$124.29	$2,734,400

Note that the example above is from 2013. Current construction estimates may be significantly higher. Cost Per SF in the table above includes only basic construction, and does not include Furniture, Fixture & Equipment (FF&E), which can add between $75-$100 per square foot in costs. Additional costs will include technology cabling, signage, and interior design.

A two-storey building, as in the example above, has some important disadvantages, including higher initial building costs due to stairways, elevators, load-bearing, live weight flooring and support requirements; higher overall staffing costs; and higher maintenance, HVAC and utilities costs. Unless space is a consideration, one storey facilities up to 40,000 square feet are preferred.

Square footage planning should also take into account unassigned space like lobby/foyer, restrooms, storage areas and corridors.

Supplementary Notes

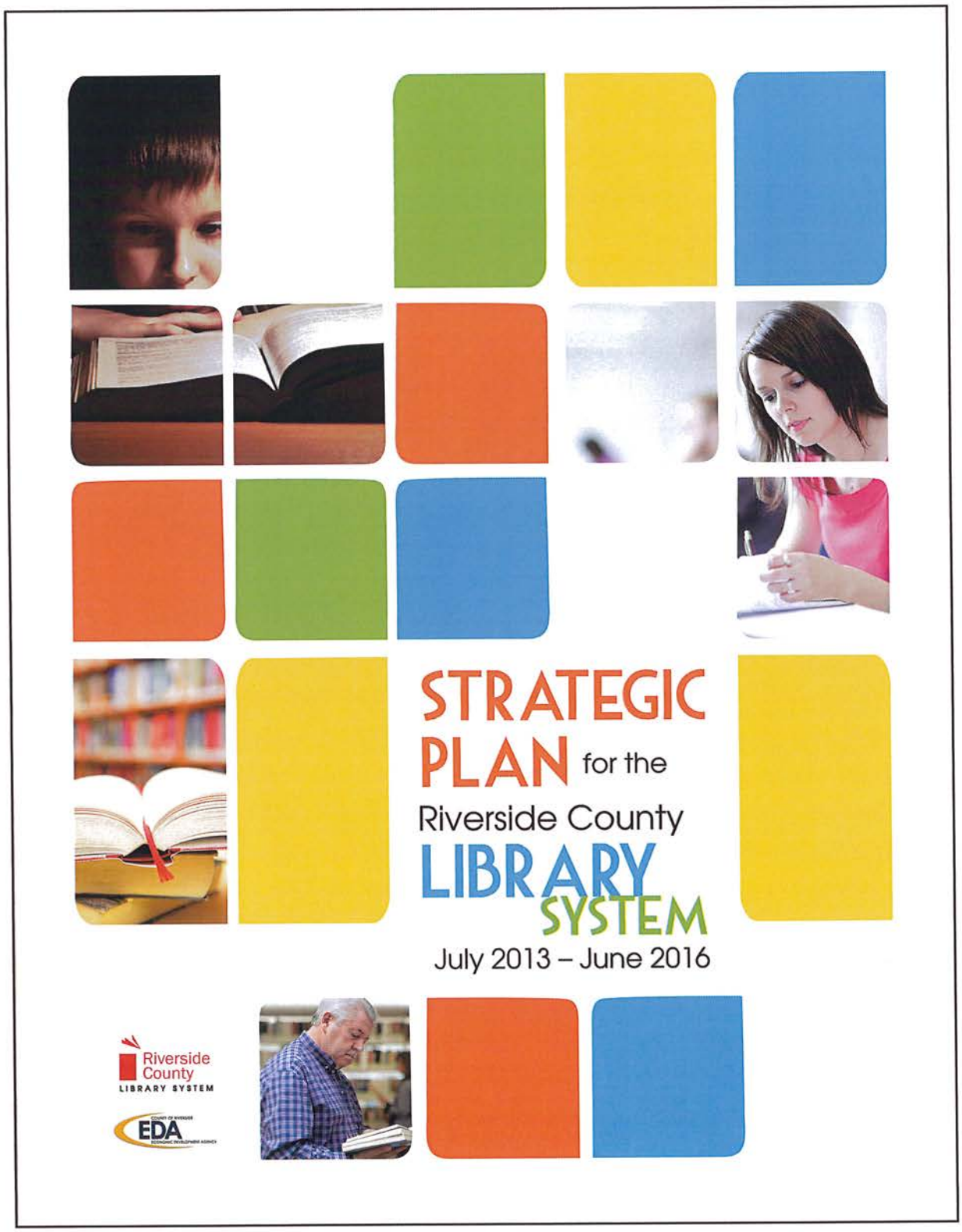
A campus environment, which would group municipal services in a single site, has advantages. In addition to shared sidewalks and walkways, parking spaces can be shared, and made available for library use after business hours. Consolidating municipal activities also allows some sharing of space such as conference and meeting rooms.

To estimate floor loading*, the weight of a single tier bookstack filled with books to typical working capacity, may be figured at 35 lbs. per cubic foot of range. Normally, the floor load for bookstacks and books can be safely figured at 150 lbs. per square foot. Additional allowances for live loads may be required, depending on local building codes.

*http://www.borroughs.com/portals/0/pdfs/wilsonstakbookstackplanningandlayoutguide.pdf

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan



Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

Riverside County
Board of Supervisors

JOHN BENOIT, CHAIR
MARION ASHLEY
KEVIN JEFFRIES
JEFF STONE
JOHN TAVAGLIONE

Economic Development Agency

ROB FIELD ASSISTANT COUNTY EXECUTIVE OFFICER/EDA
LISA BRANDL MANAGING DIRECTOR
SUZANNE HOLLAND ASSISTANT DIRECTOR

Riverside County
Library System

BARBARA HOWISON LIBRARY ADMINISTRATOR
BARBARA BOWIE ZONE MANAGER
SHERRY MARTINEZ ZONE MANAGER
DAWN WASLEY ZONE MANAGER

Special thanks to: Yesenia Araiza, Sylvia Weck, and Sue Goodwin

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

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Tell Our Story: Network With Our Communities

Visit a Comfortable and Safe Place

Satisfy curiosity: Lifelong Learning

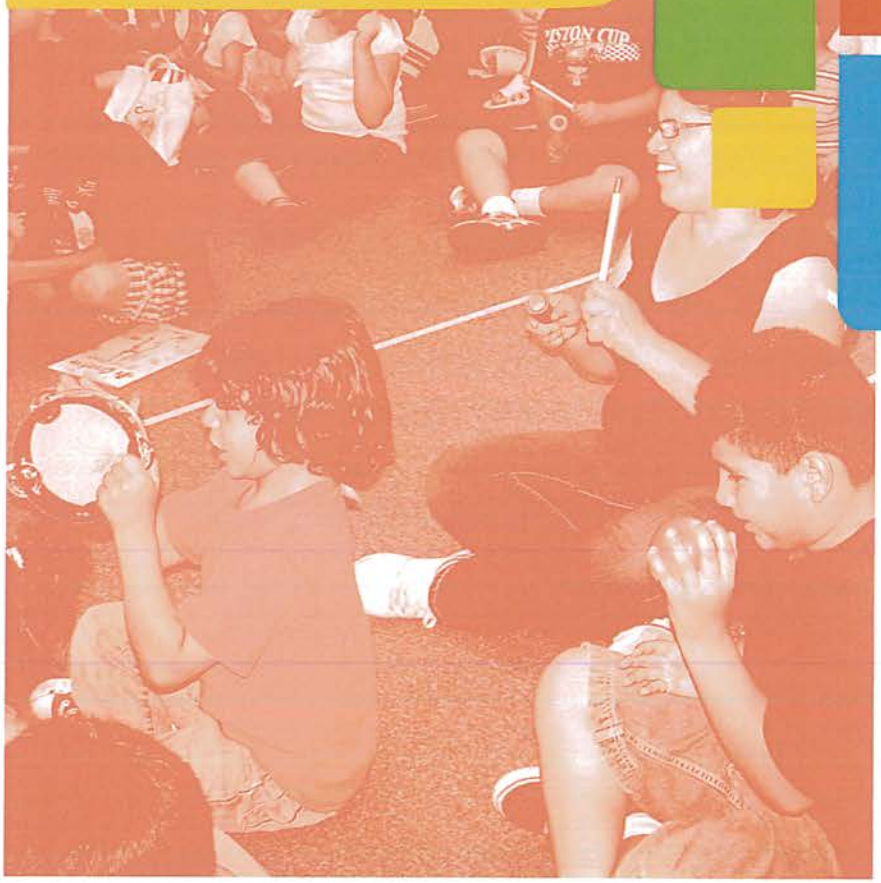
Children and Teens

Communication

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

INTRODUCTION



Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

A MESSAGE FROM
BARBARA E. HOWISON
LIBRARY ADMINISTRATOR

This three year Strategic Plan July 2013-June 30, 2016, for the Riverside County Library System represents many hours of discussion and deliberation by community groups of residents in the County of Riverside and staff members of the library system.

Dozens of community members were recruited from five communities, one from each of the County Board of Supervisors District, to attend scheduled planning sessions. Participants from the local jurisdictions included representatives from cities, municipal advisory councils, education, Chambers of Commerce, non-profit organizations, service clubs, Friends of the Library groups and senior centers. Mark Smith, LSSI's Vice President for West Coast Operations, facilitated the meetings.

Sessions began with a community visioning process followed with a SWOT analysis with attendees identifying the Strengths, Weaknesses, Opportunities, and Threats of their community.

After completing the SWOT analysis, the Library Manager spoke to the group about the services and programs the library provides. The group then began narrowing down the discussion to which areas the library would be able support.

Notes from these sessions and the resulting observations were reported to the Library Management Team who, in turn, held meetings with library managers to discuss their goal setting strategies reflecting the compiled comments and recommendations.

The goals created from this entire process are identified in this document. We hope you like this plan as we believe that it provides an exciting roadmap for the long-term growth and excellence of the Riverside County Library System.

Barbara Howison, Library Administrator

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

DOCUMENT OVERVIEW

This document represents the 3 year strategic plan for the Riverside County Library System (RCLS), July 2013 – June 2016.

Achieving the goals outlined in this plan requires effort and coordination between the Library, the County of Riverside Economic Development Agency, the Friends of the Library, and the support of public and private funders along with interested patrons and residents.

GATHERING INPUT FOR THE PLAN

Community and staff input for this plan was gathered over many months through group sessions and staff meetings. Additional information was gleaned from Comment Cards submitted from patrons and Contact Us comments from the RCLS website.

Group sessions
Five group sessions were conducted throughout the five supervisorial districts of the County to gather input for members of the communities. Both users and non-users of the library participated.

Staff meetings
Additional meetings were held with staff to discuss the results of the groups' discussions and to begin the process of the goal setting phase of the plan.

Comment Cards and Contact Us Comments
Dozens of cards and comments were received during this process, many referencing desired services, collection enhancements, and technology related suggestions.

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

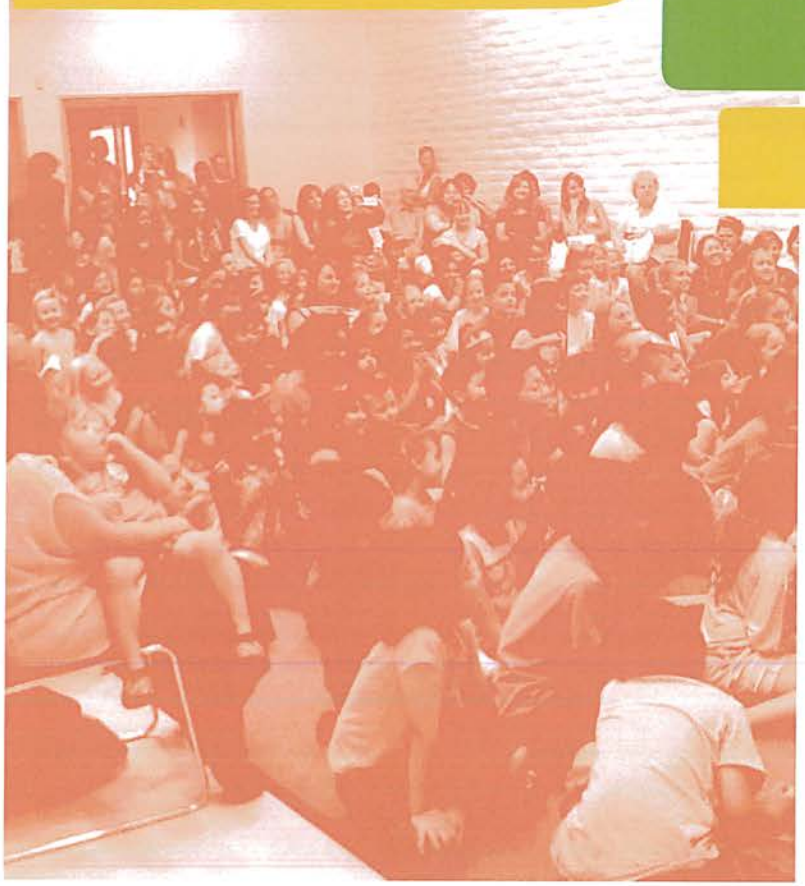
Community Focus Group Members

ALMUENA THELMA
ARNOLD LINDA
BEDFORD HELEN
BOWMAN JERRY
BURCH PAULA
BUTLER RON
CALAMBROGIO GIOVANNA
CALIVA ROBERT
CALLAWAY LINDA
CAVE CARMEN
CHERRY CARYN
COLUMBRA MIKE
COOPER MARK
COUSINS LEE
CRATER MARY
DAVIS TRACY
DENVER LINDA
DENVER JOHN
DUNLEAVY JIM
ESCOBAR GRACE
FREY JEAN MARIE
FUHRMAN TOM
GAUNT KEN
GOMEZ ANNA
GREEN SHIRLEY
GREENBERG JONATHAN L.
HANSEN ALMA
HELLWEG OPAL
HERNANDEZ GLORIA
JOHNSON ROB
JOHNSTON DONNA
KROENCKE ERIC
KUENZI DARCY
MACDONALD CHRISTOPHER
MARTINEZ MARITZA
MILLER ANNE
MILLER DOUG
NAVARRETE CESAR
NYLAND MONICA
O'DONNELL BUD
PARKS YVONNE
PETERSON PETE
PIHL JOHN
PLUTE JEANINE
PYE JAN
REED DOT
REYES CHRYSTEE
ROBBINS BILL
ROMERO CHARLES
STONE JEFF
TOWELS NORMAN
TWYMAN FRED
VILLANNEVA TONY
VIZCARRA LYNANA
WILLIAMS GILBERT
WILLIAMS YOLANDA
WOLONS DOROTHY

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

THE LIBRARY
AND COMMUNITY



Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

Riverside County
LIBRARY
SYSTEM

MISSION statement

Acknowledging the cultural diversity of our communities, the Riverside County Library System, in partnership with these communities, provides lifelong learning opportunities through equal access to informational, recreational, and educational materials.

VISION statement

THE RIVERSIDE COUNTY LIBRARY SYSTEM ENHANCES QUALITY OF LIFE IN OUR COMMUNITIES BY:

PROMOTING OPPORTUNITIES to engage in reading and encourage information literacy.

PROVIDING EXCEPTIONAL CUSTOMER SERVICE in a welcoming environment.

PARTNERING WITH LOCAL COMMUNITY GROUPS, schools and businesses to promote use of our services, resources, and facilities to generate support for our libraries.

RECOGNIZING AND SERVING the diverse needs and expectations of our changing communities.

PROVIDING ACCESS to global information by incorporating current and emerging technologies.

CREATING PUBLIC AWARENESS of the library as a community gathering place for educational, cultural, and recreational activities.

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

The Riverside County Library System (RCLS) serves one of the largest counties in the United States. Population growth combined with the county's vast size—over 7,000 square miles means we need many libraries spread over a large geographic area. Although there are pockets of communities served by other jurisdictions, the libraries listed on the organizational chart give you an idea of our service area.

The library system has replaced or renovated most existing facilities and added 11 new sites in the past 15 years. As of June 2013, the library system includes 35 branch libraries, two bookmobiles, a City museum, and the Library Management Office/RCLS Automation Center.

HERE ARE HIGHLIGHTS OF SOME OF OUR SERVICES YOU MIGHT NOT BE FAMILIAR WITH:

Some of the technology changes include RFID (Radio Frequency Identification) with self-checkout and bin sorters for returned books, wireless connectivity (WiFi) at almost all of our libraries with the remaining six due to have this capability by the end of this fiscal year, downloadable music (Freegal), eBooks, MP3 players with audio books installed on them (Playaways), and video games, all this over and above many public access computers. Some libraries have laptops, iPads, and eReaders available for the public.

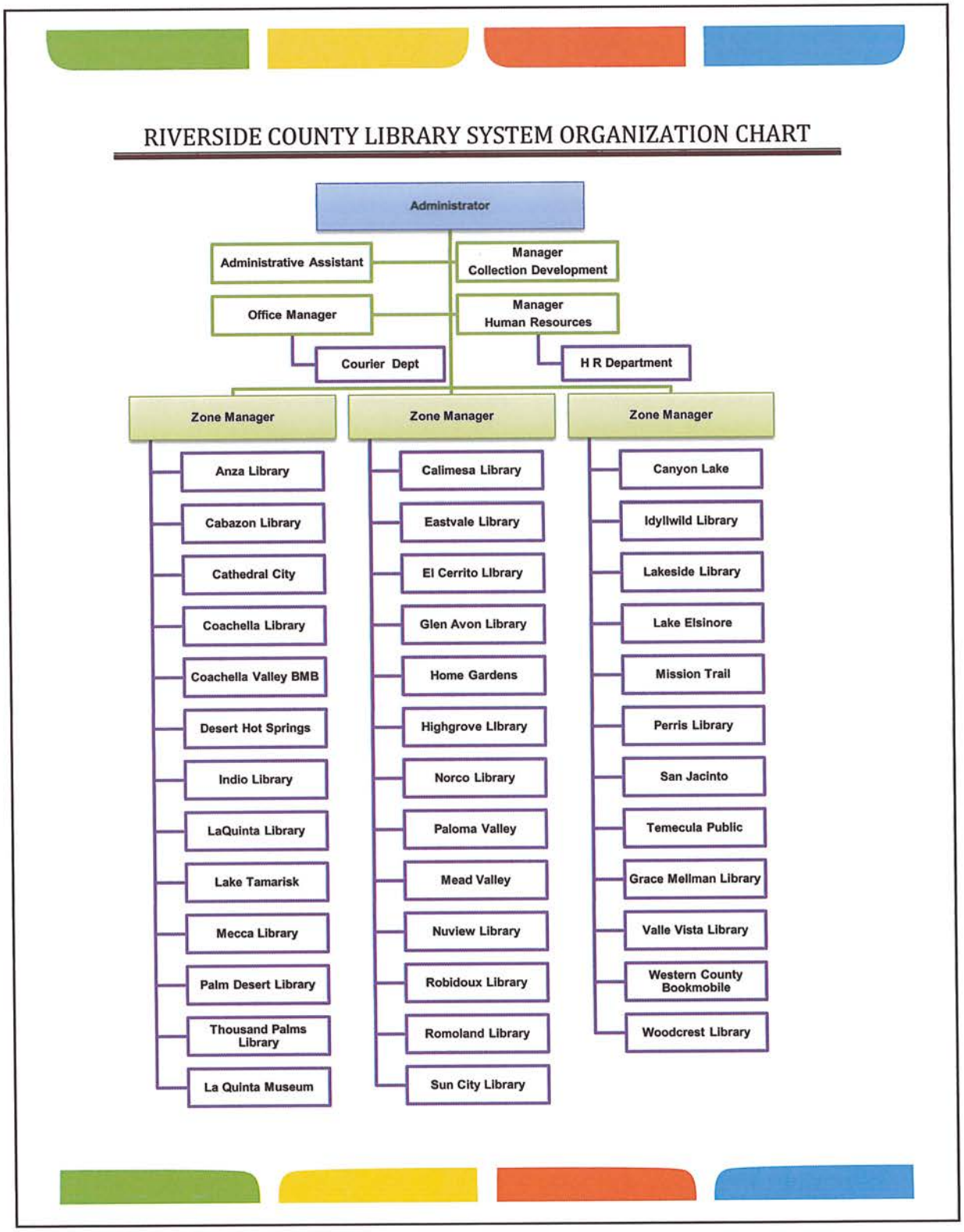
Along with many useful databases with access from every library and some from remote (including home) computers, RCLS offers Brainfuse HelpNow. This is a comprehensive suite of online academic services designed to support many learning needs and styles—live online homework help, academic skills-building, a writing lab, a foreign language (Spanish) lab, study aids, and collaborative tools.

FlashBooks! Is a print-on-demand service based at the Grace Mellman Library in Temecula. Customers can order print-on-demand books from a large catalog or arrange, for a fee, self-publishing of their own works.

The RCLS Literacy Program, supports adult literacy, family literacy, and English as a Second Language. It is funded by grants, donations from generous supporters and successful through a lot of effort by fantastic volunteers.

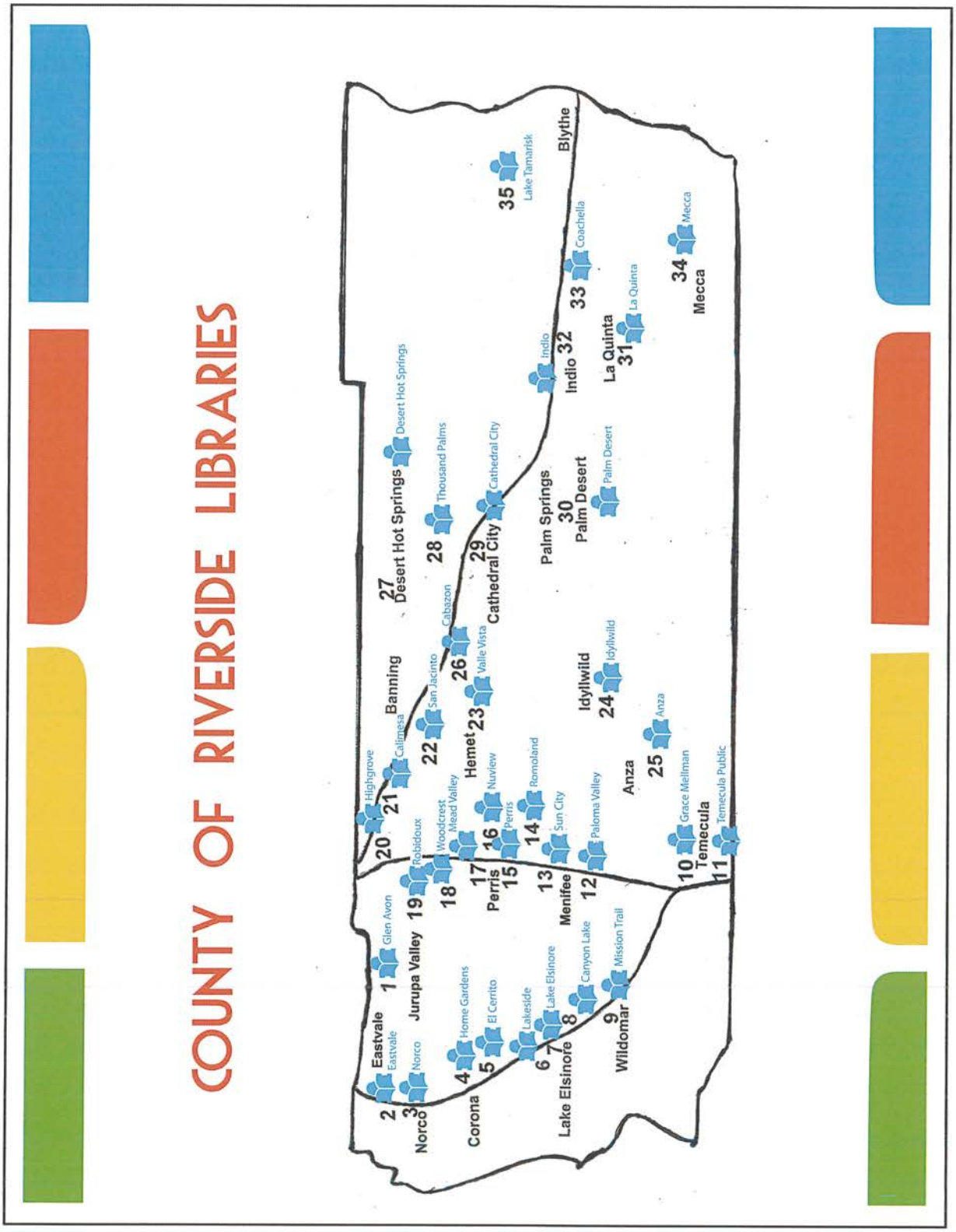
Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan



Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

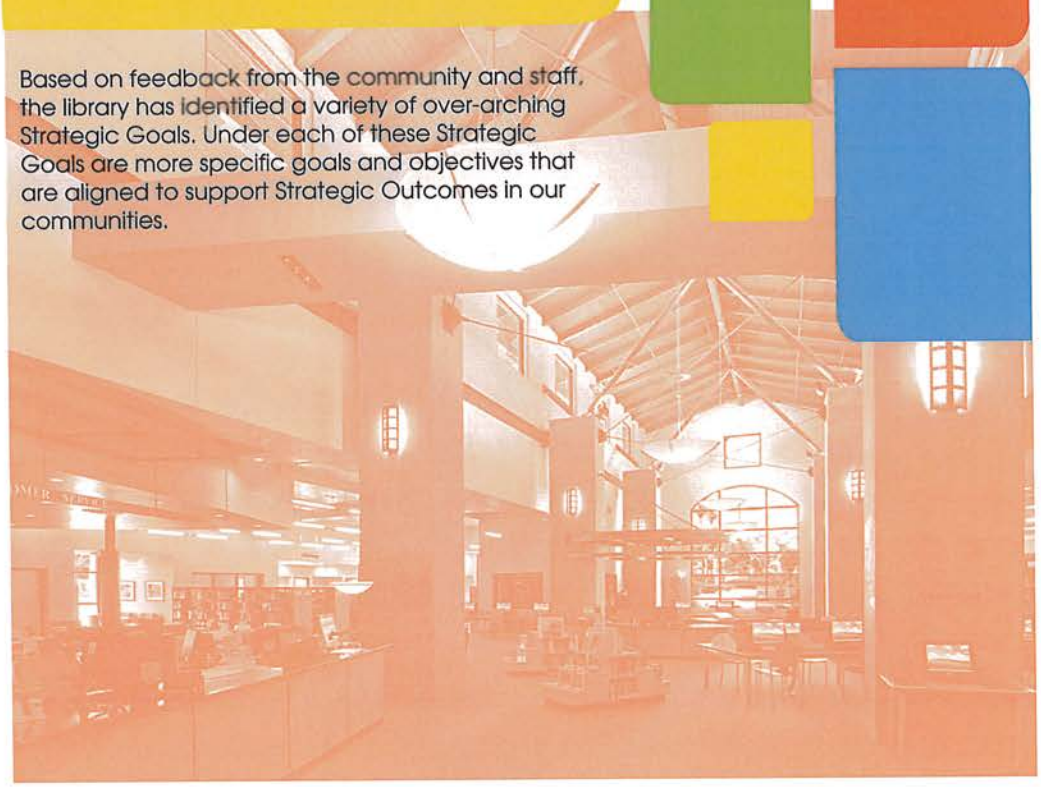


Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

ABOUT OUR GOALS: AN OVERVIEW

Based on feedback from the community and staff, the library has identified a variety of over-arching Strategic Goals. Under each of these Strategic Goals are more specific goals and objectives that are aligned to support Strategic Outcomes in our communities.



Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

TELL OUR STORY:
Network with our Communities

GOALS

- Increase the visibility of the library
- Develop Community Partnerships
- Increase staff's awareness of community needs and resources

OBJECTIVES

- Increase social networking including a Facebook page for each library
- Each library will create a guide/list of community services and will contact at least 2 of these organizations in order to form partnerships for events and programs
- In conjunction with local organizations or service groups 10 libraries will develop diverse programming to use as templates for the entire system i.e. California State Library's Veterans Project with local VFWs
- Each manager will prepare a collection development plan using the Collection Performance Report to meet the needs of their specific communities
- Increase community outreach with every manager and/or other staff person attending at least 4 Chamber of Commerce meetings, Municipal Action Council meetings, community-wide events, or similar outreach efforts

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

VISIT A COMFORTABLE PLACE

GOALS

- Make the Library a welcoming, comfortable, safe place to visit
- Provide areas for our public to meet and interact with others or to sit quietly and read
- Create open and accessible spaces to meet the needs of diverse populations

OBJECTIVES

- Improve security inside and outside of libraries based on incident reports
- Create a brochure to promote public and private use of the libraries' community rooms
- Create a template for an attractive teen area for libraries to use as a planning guide
- Identify best practices for a good balance for patrons who are using technology and those expecting a more traditional environment
- Review interiors of all libraries older than 5 years or a remodel older than 5 years and offer five design changes for each of these sites to meet the needs of their patrons

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

SATISFY CURIOSITY:
Lifelong Learning

GOALS

- Adults and teens will have the support they need to improve their literacy skills in order to meet their personal goals
- Residents will have the resources they need to explore topics of personal interest and continue to learn throughout their lives

OBJECTIVES

- Offer four English as a second language classes at three regional sites totaling 12 sessions
- Offer adult literacy tutoring in all three zones holding three tutor training sessions, one in each zone
- Purchase $2000 of literacy materials to support both ESL and one-on-one tutoring
- Provide workshops and lectures around civic engagement and personal interests. Six libraries will participate in CAL Humanities programs on civic engagement.
- All libraries will hold at least one event to encourage lifelong learning
- Develop programs that relate to job searching, use of technology, financial planning and other currently requested topics at five of our libraries and share the curriculum and program outline with the entire library system.
- The library system's Collection Development Manager will create materials selection list on specific areas of diversity identified from Focus Groups, Comment Cards, Contact Us recommendations and other communications from the public

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

CHILDREN AND TEENS

GOALS

- Create Young Readers: Provide programs and services designed to ensure that children will enter school ready to learn to read, write, and listen.
- Succeed In School: Students will have the resources they need to succeed in school.
- Learn to Read and Write: Teens will have the support they need to improve their literacy skills in order to meet their personal goals and fulfill their responsibilities later in life as parents, citizens, and workers.
- Express Creativity: Teens will have the services and support they need to express themselves by creating original print, video, audio, or visual content in a real-world or online environment.

OBJECTIVES

- All libraries will hold Dia de los Ninos/ Dia de los Libros events
- 2 additional libraries will offer bilingual storytimes
- Each manager or youth service staff person will contact 2-5 schools to arrange visits to school sites or class visits
- 10 large libraries will offer training sessions for students on database use including Brainfuse
- The library system's 3 Zone Managers will identify for each library in their area of supervision organizations with similar goals such as preschools, tutoring centers, teen centers, etc. and encourage library staff to develop partnerships with these groups
- 4 additional libraries will establish teen book clubs
- 2 libraries will partner with community groups to provide after school tutoring i.e. Interact Clubs
- 2 libraries will adopt Temecula Public Library's grant funded program providing services to those with special needs
- 2 libraries will write grants or identify other sources of funding to purchase equipment and supplies for graphic arts, film, and other visual art activities
- 4 libraries will form creative writing clubs and publish collections using Flashbooks!

Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan

COMMUNICATION

GOALS

- Develop effective methods of communicating throughout the library's organizational structure
- Develop effective methods of communicating with our community leaders, organizations, and residents

OBJECTIVES

• Ask all staff for ideas about better communication within the library organization then implement them to see which are the most successful using online surveys, manager meetings, and All Staff Development Day sessions

• The Management Team, with help from Automation, will develop the RCLS intranet to make it a viable and up to date tool for all staff

• All library managers will identify needed items for library displays and Administration will arrange with EDA methods of purchasing or locating appropriate furniture and supplies

• Continue to promote internal committees such as Libraries Going Forward, STARS, and the Tech Team to brainstorm forward thinking concepts to improve services to our public,

• Offer 4 training sessions for staff with help from EDA's Marketing Department on press releases, public speaking, and available social networks and other tools to reach out to our community members

• Automation will continue to offer ideas and training on electronic methods to promote library services while attending 3 Zone Managers meetings

• Management will discuss and develop a plan to engage staff in some level of embedded librarianship and implement 1 pilot project

• Library Administrator will work with the County EDA's marketing department to develop techniques on marketing library resources and programs

• The 3 Zone Managers will compile advice and tips from libraries that have successfully branded and marketed their services that will then be shared system-wide

• Assign 1 staff person to collate patron requests and information from Comment Cards, Contact Us emails, and other communications and review at monthly Management Team meetings to increase awareness of areas needing improvement. Team members will evaluate and develop appropriate action plans

Appendix B – Project Resumes

Dana Braccia

Vice President

LS&S Expertise

- Short and long range strategic planning
- Municipal partnerships / Community integrated services
- Finance / Analytics / Project Management
- Collections / Programming
- Staff training / Development and instructional design
- Library expansion / Remodels and service redesigns

Experience

LIBRARY SYSTEMS & SERVICES, LLC
VICE PRESIDENT PUBLIC LIBRARY SERVICES
MARCH 2013 - PRESENT

Provides strategic oversight and operational management for public library contracts throughout the US. Works toward excellence in the provision of library services to the clients' public library users. Carries out the clients' intentions and strives for a successful operation in all aspects of providing library services. As a Vice President participates in corporate planning, budgeting, and marketing to new communities.

CITY OF SCOTSDALE, PUBLIC LIBRARY
SENIOR MANAGER/CONTENT MANAGER/COLLECTION DEVELOPMENT
AUGUST 2001 – MARCH 2013

Oversaw finance, accounting, HR and contracts administration for main library and four community libraries. Promoted cooperation of effort, coordinated staff training, and managed operational budgets. Provided leadership to advance digital library infrastructures, collections and services. Supervised Collection Development and Metadata teams.

CITY OF SCOTSDALE, STADIUM
COMMUNITY SERVICES DIRECTOR
NOVEMBER 1997 – AUGUST 2011

Oversaw activities and events at the Scottsdale Stadium including the S.F. Giants Spring Training, festivals, and corporate programs. Designed and maintained the departmental website, and oversaw grants, sponsorships and community partnerships.

CAREFREE RESORTS
SALES MANAGER FOR ARIZONA AND COLORADO
APRIL 1993 – OCTOBER 1997

Generated and coordinated group, corporate and leisure business overseeing client relations, contracts and marketing.

GUAM HILTON INTERNATIONAL
PUBLIC RELATIONS MANAGER
SEPTEMBER 1989 – JANUARY 1992

Oversaw all hotel marketing and public relations efforts and coordinated special events including culinary and wine festivals, art shows, community programs, and tournaments.

Education

- **UNIVERSITY OF ARIZONA**, MLIS
- **ARIZONA STATE UNIVERSITY**, BS, MARKETING

Teaching / Industry Involvement

- **University of Arizona,** IRLS559 Library Marketing 2009 - 2014
- **University of Kentucky,** LIS 690 Library Marketing 2012 / 2013 / 2014
- **University of Tennessee,** Library Marketing 2012 / 2013, 2015
- **PRESIDENT /** Mountain Plains Library Association, 2011 – 2012
- **Councilor /** American Library Association, 2012 – 2015

Appendix B – Project Resumes (cont.)

Barbara Howison

Regional Director – Western Operations

Skills & Expertise

- Library building trends
- Plan analyzing
- Green design elements
- Budgeting and action plans
- Library administration
- Securing grants
- Computer technology

Experience

LIBRARY SYSTEMS & SERVICES, LLC
REGIONAL DIRECTOR, WESTERN OPERATIONS
2014 - PRESENT

Oversees three public/private library partnerships in California, including one large County Library System. Also serves as the Riverside County Librarian. Works toward excellence in the provision of library services to the client's public library users. Carries out the client's intentions and strives for a successful operation in all aspects of providing library services. As a Regional Manager participates in corporate planning, budgeting, and marketing to new communities in the company's Western Region.

LIBRARY SYSTEMS & SERVICES, LLC
LIBRARY ADMINISTRATOR
JANUARY 2013 - 2014

Directed the operations of the Riverside County Library System, comprised of 35 libraries, two bookmobiles and one museum. Responsibilities included budgeting, branch operations, human resources, collection development, literacy and other special programs, and automation. Led the visioning process for moving the system forward using best practices and new technologies. Directed the implementation of the system's strategic plan. Served as a liaison between LS&S and the Riverside County Economic Development Agency.

LIBRARY SYSTEMS & SERVICES, LLC
DEPUTY ADMINISTRATOR
MAY 2010 – DECEMBER 2012

Oversaw the management and operations of the Riverside County Library System. Directly and indirectly supervised more than 350 employees. As senior management, led the upper management team toward goals and objectives regarding policy, procedures, projects, programming, building plans, and technology implementation. Took charge of the library system's strategic planning process and participated in all phases of its development.

LIBRARY SYSTEMS & SERVICES, LLC
BUILDING PROJECT COORDINATOR & STAFF MANAGEMENT
JULY 1997 – APRIL 2010

Managed groups of libraries, including large resource libraries. Hired, trained, and supervised professional and paraprofessional staff. Represented the Riverside County Library System as the Building Projects Coordinator on 20 building projects from the design phases through grand openings.

Education

- **UNIVERSITY OF SOUTHERN CALIFORNIA**, MLS
- **CALIFORNIA STATE UNIVERSITY**, BA
- **HARVARD UNIVERSITY, GRADUATE SCHOOL OF DESIGN**, PLANNING & DESIGN OF PUBLIC LIBRARIES

Appendix B – Project Resumes (cont.)

Barbara Howison (cont.)

Regional Director – Western Operations

Professional Organizations	• American Library Association • Public Library Association • California Library Association - Management Section
Professional Training	• "Going Green" Library Journal Design Institute • Libris Design, library building plan software • Polaris, automated system • Grantsmanship Center of Los Angeles • Resource Center of Moreno Valley Grant Center
Community Service & Awards	• Riverside County Archives Commissioner, past chair • Rotary Club of Perris, past president • Outstanding Rotarian of the Year • Perris Valley Chamber of Commerce past president • Recipient of "People Who Make a Difference" from The Press-Enterprise

Appendix C – Sample General IT Assessment Overview

1. Global – what measures are tracked to determine if a library is successful?
    a. What is considered successful?
    b. How is IT evaluated today?
2. Responsibilities – What IT responsibilities are anticipated for LS&S?
    a. Who is responsible for IT services? Please provide an organization chart.
    b. What are the SLAs anticipated?
    c. What is the availability/reliability for IT systems?
3. Investments – what IT systems, network, software, etc. are/were planned for replacement?
    a. What is the IT Budget?
        1. What are the anticipated capital needs to the Libraries?
        2. What are the operational costs for the libraries?
            a) Who owns Licensing for software?
            b) VMWare, HyperV, Microsoft Office, Windows, Windows Server?
            c) Is the maintenance current on all servers, OS, Hypervisors?
                i. Hardware, Software
                ii. Hardware maintenance on systems? What is the expiration dates?
                iii. What is the contracted response?
        3. Network Costs
            a) Provide a breakdown of circuits, speeds, vendors, and pricing?
            b) What are the terms lengths for contacts?
            c) Provide a usage breakdown for each circuit (% utilized)?
            d) How is the network managed?
        4. IT Facilities
            a) What facilities are in use by IT for the libraries?
            b) What are the contract terms, costs, termination fees?
            c) What is the purpose, size, location of the facilities?
                i. What locations are in the libraries that are used by IT?
                ii. What equipment, systems, networking is located there?
            e) What investments are anticipated or needed in the IT areas?
            f) What budget is set aside to replace outdated equipment?
        5. What equipment and costs are associated with the following:
            a) Staff computing
            b) Patron Access, children's systems

Appendix C – Sample General IT Assessment Overview (cont.)

c) Self-Check

d) RFID/Barcoding

e) Copiers, scanners, printers

f) Cable, wiring

g) Wireless

h) Video/Audio systems, editing

i) Teleconference/Videoconference

6) What the future IT spending plan?

a) What funding is already contracted or allocated for future years?

4. What is the Library Management System? Is that part of the RFI/P?

a. Who supports the LMS?

a. How many people are supporting the LMS?

b. What are the names, titles, salaries, skills, job function?

b. What is the service levels for LMS?

c. How many clients are deployed per library?

d. What capabilities are deployed, qty, and what vendor?

1) Self-Check infrastructure, Security provisions?

2) eCommerce solutions, PCI Compliance?

3) PC reservations and scheduling mechanisms?

a) What are the measures or statistics on usage?

b) Mobile or Client Printing

e. What tools are in place to manage collections?

f. What tools or reporting elements are in place to manage acquisition and inventory?

g. What tools are in place for custom reporting of activity, inventory, and performance?

5. Inventory of Devices – Please list the library equipment

a. Count of patron systems, model, age

b. Count of staff equipment, model, age

c. Library self-check, RFID, barcode technologies

d. Servers, count, model, age

e. Network devices, model, size

f. Wireless devices, count, model

g. Hardware and software licensing, count by type

h. Microsoft server and client licensing

Appendix C – Sample General IT Assessment Overview (cont.)

i. Warranties and maintenance contracts

j. What is the mobile device policy?

k. Does the library deploy tablets or laptops by patrons? If so, what controls distribution?

6. Software – list of software, maintenance contracts in effect

a. What MS CALs (client access licensing) is deployed?

b. How is software deployed?

c. What server licensing is deployed? Is Software Assurance included (to maintain current levels)?

7. Web Systems – who is responsible for the Library Web site?

a. Who maintains or updates content?

b. Where is it hosted?

8. Applications – what applications are provided or anticipated for Staff and/or Patrons?

a. Email

b. Office

c. Anti-Virus

d. File services

9. Security – What is the library security posture?

a. Desktop and Server protections?

b. Patron Filtering?

c. Mobile and wireless access policy and protections?

d. What is the domain security architecture and design?

e. What efforts are in place to enhance staff and patron security? Who is responsible for security of library facilities and users?

10. Device & IT Polices – What is the policy for replacing outdated equipment?

a. At what age do you consider replacing equipment?

b. Who is paying for replacement?

c. Who is paying for repairs?

d. Are there desktop policies on use and security?

11. Copiers – What is the policy regarding consumables? Repairs and Replacements

12. Communications – Who is responsible for internet and inter-library circuits?

a. What is the bandwidth between libraries and internet?

b. What filtering and security measures are in place?

c. Inventory of Phone Systems (make, model, warranty)

1) Who is responsible for Phone system repairs, maintenance?

Appendix D – Sample Survey

NOTE: Final questions for Surveys & Focus Groups will be reviewed and approved by County in Phase One.

Please take a moment to answer this anonymous survey about the library. All questions are optional.

Section 1: Please check one answer for each of the following:

1. Do you have a library card?	Yes	No
	☐	☐

2. On average, how often do you visit the library?					
	Daily	Weekly	Monthly	Less than once a month	Never
	☐	☐	☐	☐	☐

3. How would you rate each of the following library services?					
	Excellent	Good	Fair	Poor	Don't know/Not Applicable
Customer Service	☐	☐	☐	☐	☐
Collection (books, DVDs, music, newspapers, etc.)	☐	☐	☐	☐	☐
Programs (classes, story times, etc.)	☐	☐	☐	☐	☐
Online services (website, catalog, research databases, etc.)	☐	☐	☐	☐	☐
ILL (Inter-library loan)	☐	☐	☐	☐	☐
Library policies	☐	☐	☐	☐	☐
Computers and printers	☐	☐	☐	☐	☐
Internet access	☐	☐	☐	☐	☐
Facilities	☐	☐	☐	☐	☐
Hours of operation	☐	☐	☐	☐	☐
Overall, how would you rate the library?	☐	☐	☐	☐	☐

Appendix D – Sample Survey (cont.)

4. How important is each of the following library services to you?

	Very Important	Important	Somewhat Important	Not Important	Don't know/Not Applicable
Borrowing materials (books, DVDs, music, etc.)	☐	☐	☐	☐	☐
Reference (research assistance from librarians)	☐	☐	☐	☐	☐
Programs (classes, story times, etc.)	☐	☐	☐	☐	☐
Computers and printers	☐	☐	☐	☐	☐
Help using computers, printers, etc.	☐	☐	☐	☐	☐
Study rooms/reading areas	☐	☐	☐	☐	☐
Community meeting rooms	☐	☐	☐	☐	☐
Internet access	☐	☐	☐	☐	☐
ILL (Inter-library loan)	☐	☐	☐	☐	☐
Online services (website, catalog, research databases, etc.)	☐	☐	☐	☐	☐
Photocopier	☐	☐	☐	☐	☐
Newspapers and magazines	☐	☐	☐	☐	☐
Bookmobile	☐	☐	☐	☐	☐
Homebound services	☐	☐	☐	☐	☐
Overall, how important is the library to you and your family?	☐	☐	☐	☐	☐

5. How do you typically find out about library programs? Check all that apply.

- ☐ Library Website
- ☐ Social Media (Facebook or Twitter)
- ☐ Newspaper
- ☐ Library newsletter
- ☐ Signs or flyers in the library
- ☐ Word of mouth
- ☐ Library staff
- ☐ Don't know/Not applicable
- ☐ Other: _____

Appendix D – Sample Survey (cont.)

Section 2: We value your opinions. Please answer the following questions:

6. What do you value the most about the library?

7. How could the library or its services be improved, if at all?

8. How does the library benefit you or the community?