C O N T R A C T

The COUNTY OF SAN BENITO ("COUNTY") and Library Systems & Services, LLC, a Maryland limited liability company ("CONTRACTOR" or "LS&S") enter into this contract which shall be effective on the date stated in Paragraph 1.

1. Duration of Contract.

This contract shall commence on August 23, 2016, and end on August 23, 2017, unless sooner terminated as specified herein.

2. Scope of Services.

CONTRACTOR, for COUNTY's benefit shall perform the services specified on Attachment A to this contract. Attachment A is made a part of this contract.

3. Compensation for Services.

In consideration for CONTRACTOR's performance, COUNTY shall pay compensation to CONTRACTOR according to the terms specified in Attachment B. Attachment B is made a part of this contract.

4. General Terms and Conditions.

The rights and duties of the parties to this contract are governed by the general terms and conditions mutually agreed to and listed in Attachment C. Attachment C is made a part of this contract.

5. Insurance Limits.

CONTRACTOR shall maintain the following insurance policy limits of coverage consistent with the further insurance requirements specified in Attachment C.

(a) Comprehensive general liability insurance: $1,000,000
(b) Professional liability insurance: N/A
(c) Comprehensive motor vehicle liability insurance: $1,000,000

6. Termination.

The number of days of advance written notice required for termination of this contract is 30.

7. Specific Terms and Conditions *(check one)*

[ ] There are no additional provisions to this contract.

[X] The rights and duties of the parties to this contract are additionally governed by the specific, additional terms mutually agreed to and listed in Attachment D. Attachment D is made a part of this contract.

[ ] The rights and duties of the parties to this contract are additionally governed by the specific, additional terms mutually agreed to and listed in Attachment E. Attachment E is made a part of this contract.

8. <u>Information about Contract Administrators</u>.

The following names, titles, addresses, and telephone numbers are the pertinent information for the respective contract administrators for the parties.

Contract Administrator for COUNTY:	Contract Administrator for CONTRACTOR:
Name: Louie Valdez_____	Name: Dana Braccia
Title: Clerk of the Board_____	Title: Vice President
Address: 481 4th Street_____	Address: 2600 Tower Oaks Blvd., Suite 510
Hollister, California 95023	Rockville, Maryland 20852
Telephone No.: (831)-636-4000_____	Telephone No.: (301)-540-5100
Fax No.: (831)-636-4010_____	Mobile No.: (480)-710-8909

SIGNATURES

APPROVED BY COUNTY:	APPROVED BY CONTRACTOR:
_____	_____
Name: Robert Rivas_____	Name: Paul Colangelo
Chair, San Benito County Board of Supervisors	Title: President
Date: 09/13/2016_____	Date: _____

APPROVED AS TO LEGAL FORM:
San Benito County Counsel's Office

_____

By: _____

Date: _____

ATTACHMENT A
Scope of Services

As per LS&S proposal for a Library Needs Assessment for San Benito County Free Library and TEL Center dated June 3, 2016

END OF ATTACHMENT A.

ATTACHMENT B
Payment Schedule

B-1. BILLING

Charges for services rendered pursuant to the terms and conditions of this contract shall be invoiced on the following basis: (check one)

[ ] One month in arrears.
[X] Upon the complete performance of the services specified in Attachment A.
[ ] The basis specified in paragraph B-4.

B-2. PAYMENT

Payment shall be made by COUNTY to CONTRACTOR at the address specified in paragraph 8 of this contract, net thirty (30) days from the invoice date.

B-3. COMPENSATION

COUNTY shall pay to CONTRACTOR: (check one)

[X] a total lump sum payment of $15,000.00_____, or

[ ] a total sum not to exceed _____,

for services rendered pursuant to the terms and conditions of this contract and pursuant to any special compensation terms specified in this attachment, Attachment B.

B-4. SPECIAL COMPENSATION TERMS: (check one)

[X] There are no additional terms of compensation.
[ ] The following specific terms of compensation shall apply: (Specify)

END OF ATTACHMENT B.

ATTACHMENT C
General Terms and Conditions

C-1. INDEMNIFICATION.

CONTRACTOR and COUNTY each agree to indemnify, defend and save harmless the other party and the other party's officers and employees, from and against any and all claims and losses whatsoever arising out of, or in any way related to, the indemnifying party's performance under this contract, including, but not limited to, claims for property damage, personal injury, death, and any legal expenses (such as attorneys' fees, court costs, investigation costs, and experts' fees) incurred by the indemnitee in connection with such claims or losses. A party's "performance" includes the party's action or inaction and the action or inaction of that party's officers and employees.

C-2. GENERAL INSURANCE REQUIREMENTS.

Without limiting CONTRACTOR's duty to indemnify COUNTY, CONTRACTOR shall comply with the insurance coverage requirements set forth in the contract and in this attachment. Those insurance policies mandated by Paragraph C-3 shall satisfy the following requirements:

(a) Each policy shall be issued by a company authorized by law to transact business in the State of California.

(b) Each policy shall provide that COUNTY shall be given notice in writing at least thirty (30) days in advance of any change, cancellation, or nonrenewal thereof.

(c) The comprehensive motor vehicle and comprehensive general liability policies shall each provide an endorsement naming the County of San Benito and its officers, agents and employees as additional insureds.

(d) The required coverage shall be maintained in effect throughout the term of this contract.

CONTRACTOR shall require all subcontractors performing work under this contract to obtain substantially the identical insurance coverage required of CONTRACTOR pursuant to this agreement.

C-3. INSURANCE COVERAGE REQUIREMENTS.

If required by paragraph 5 of the contract, CONTRACTOR shall maintain the following insurance policies in full force and effect during the term of this contract:

(a) Comprehensive general liability insurance. CONTRACTOR shall maintain comprehensive general liability insurance, covering all of CONTRACTOR's operations with a combined single limit of not less than the amount set out in paragraph 5 of this contract.

(b) Professional liability insurance. CONTRACTOR shall maintain professional liability insurance with liability limits of not less than the amount set out in paragraph 5 of this contract.

(c) Comprehensive motor vehicle liability insurance. CONTRACTOR shall maintain comprehensive motor vehicle insurance covering all motor vehicles (including owned, non-owned and hired) used in providing services under this contract, with a combined single limit of not less than the amount set out in Paragraph 5 of this contract.

(d) Workers' compensation insurance. CONTRACTOR shall maintain a workers' compensation plan covering all of its employees as required by California Labor Code Section 3700, either through workers' compensation insurance issued by an insurance company or through a plan of self-insurance certified by the State Director of Industrial Relations. If CONTRACTOR elects to be self-insured, the certificate of insurance otherwise required by this contract shall be replaced with a consent to self-insure issued by the State Director of Industrial Relations.

C-4. CERTIFICATE OF INSURANCE.

Prior to the commencement of performance of services by CONTRACTOR and prior to any obligations of COUNTY, CONTRACTOR shall file certificates of insurance with COUNTY, showing that CONTRACTOR has in effect the insurance required by this contract. CONTRACTOR shall file a new or amended certificate promptly after any change is made in any insurance policy which would alter the information on the certificate then on file. In lieu of providing proof of insurance, CONTRACTOR may provide proof of self-insurance meeting requirements equivalent to those imposed herein. CONTRACTOR warrants that CONTRACTOR's self-insurance provides substantially the same protection to COUNTY as the insurance required herein. CONTRACTOR further agrees to notify COUNTY in the event any change in self-insurance occurs that would alter the obligations undertaken in this contract within thirty (30) days of such change.

C-5. RECORDS TO BE MAINTAINED.

CONTRACTOR shall keep and maintain accurate records of all costs incurred and all time expended for work under this contract. CONTRACTOR shall contractually require that all of CONTRACTOR's subcontractors performing work called for under this contract also keep and maintain such records. All such records, whether kept by CONTRACTOR or any subcontractor, shall be made available to COUNTY or its authorized representative, or officials of the State of California for review or audit during normal business hours, upon reasonable advance notice given by COUNTY, its authorized representative, or officials of the State of California.

C-6. RETENTION OF RECORDS.

CONTRACTOR shall maintain and preserve all records related to this contract for a period of three years from the close of the fiscal year in which final payment under this contract is made. CONTRACTOR shall also contractually require the maintenance of such records in the possession of any third party performing work related to this contract for the same period of time. Such records shall be retained beyond the three-year period, if any audit involving such records is then pending, until the audit findings are resolved. The obligation to insure the maintenance of the records beyond the initial three year period shall arise only if the COUNTY notifies CONTRACTOR of the commencement of an audit prior to the expiration of the three year period.

C-7. TITLE TO DOCUMENTS; COPYRIGHT.

All reports and other materials collected or produced by the CONTRACTOR or any subcontractor of CONTRACTOR shall, after completion and acceptance of the contract, become the property of COUNTY, and shall not be subject to any copyright claimed by the CONTRACTOR, subcontractor, or their agents or employees. CONTRACTOR may retain copies of all such materials exclusively for administrative purposes. Any use of completed or uncompleted documents for other projects by CONTRACTOR, any subcontractor, or any of their agents or employees, without the prior written consent of COUNTY is prohibited.

C-8. INDEPENDENT CONTRACTOR.

CONTRACTOR and its officers and employees, in the performance of this contract, are independent contractors in relation to COUNTY and not officers or employees of COUNTY. Nothing in this contract shall create any of the rights, powers, privileges or immunities of any officer or employee of COUNTY. CONTRACTOR shall be solely liable for all applicable taxes or benefits, including, but not limited to, federal and state income taxes, Social Security taxes, or ERISA retirement benefits, which taxes or benefits arise out of the performance of this contract. CONTRACTOR further represents to COUNTY that CONTRACTOR has no expectation of receiving any benefits incidental to employment.

C-9. CONFLICT OF INTEREST.

CONTRACTOR covenants that it presently has no interest and shall not acquire any interest, direct or indirect, financial or otherwise, which would conflict in any manner or degree with the performance of the services hereunder. CONTRACTOR further covenants that, in the performance of this contract, no subcontractor or person having such an interest shall be used or employed.

C-10. COMPLIANCE WITH APPLICABLE LAWS.

CONTRACTOR shall comply with all applicable federal, state and local laws now, or hereafter, in force, and with any applicable regulations, in performing the work and providing the services specified in this contract. This obligation includes, without limitation, the acquisition, and maintenance of any permits, licenses, or other entitlements necessary to perform the duties imposed expressly or impliedly under this contract.

C-1 1. NONDISCRIMINATION.

CONTRACTOR shall not discriminate in the employment of persons necessary to perform this contract on any legally impermissible basis, including on the basis of the race, color, national origin, ancestry, religion, age, sex, or disability of such person.

C-12. BANKRUPTCY.

CONTRACTOR shall immediately notify COUNTY in the event that CONTRACTOR ceases conducting business in the normal manner, becomes insolvent, makes a general assignment for the benefit of creditors, suffers or permits the appointment of a receiver for its business or assets, or avails itself of, or becomes subject to, any proceeding under the Federal Bankruptcy Act or any other statute of any state relating to insolvency or protection of the rights of creditors.

C-13. PROHIBITION AGAINST ASSIGNMENT AND DELEGATION OF DUTIES.

Except as specifically authorized herein, no rights under this contract may be assigned and no duties under this contract may be delegated by CONTRACTOR without the prior written consent of COUNTY, and any attempted assignment or delegation without such consent shall be void.

C-14. NEGOTIATED CONTRACT.

This contract has been arrived at through negotiation between the parties. Neither party is to be deemed the party which prepared this contract within the meaning of California Civil Code Section 1654.

C-1 5. SEVERABILITY.

Should any provision herein be found or deemed to be invalid, this contract shall be construed as not containing such provision, and all other provisions which are otherwise lawful shall remain in full force and effect. To this end, the provisions of this contract are declared to be severable.

C-16. ENTIRE CONTRACT.

This contract is the entire agreement of the parties. There are no understandings or agreements pertaining to this contract except as are expressly stated in writing in this contract or in any document attached hereto or incorporated herein by reference.

C-17. TIME IS OF THE ESSENCE.

Time is of the essence in the performance of this contract.

C-18. TERMINATION.

Either party may terminate this contract, with or without cause, at any time. In order to terminate this contract, the terminating party shall give advance written notice to the other party. The termination shall be effective no earlier than the expiration of the number of days specified in paragraph 6 of this contract. The termination notice shall be made as specified in paragraph C-19, below. In the event of termination, COUNTY shall pay CONTRACTOR for all work satisfactorily performed prior to the effective date of the termination.

C-19. NOTICES.

Notices to the parties in connection with the administration of this contract shall be given to the parties' contract administrator personally, by regular mail, or by facsimile transmission as more particularly specified in this paragraph. Notices will be deemed given on:

(a) The day the notice is personally delivered to the contract administrator or the office of the party's contract administrator; or

(b) Five days after the date the notice is deposited in the United States mail, addressed to a party's contract administrator as indicated in this contract, with first-class postage fully prepaid; or

(c) On the day that the notice is transmitted by facsimile to a party's facsimile number specified in paragraph 8 of this contract, provided that an original of such notice is deposited in the United States mail, addressed to a party's contract administrator as indicated in this contact, on the same day as the facsimile transmission is made.

C-20. RESPONSIBILITY OF CONTRACT ADMINISTRATORS.

All matters concerning this contract which are within the responsibility of the parties shall be under the direction of, or shall be submitted to, the respective contract administrators or to the party's employee specified, in writing, by the contract administrator. A party may, in its sole discretion, change its designation of its contract administrator and shall promptly give written notice to the other party of any such change.

C-21. MATERIALITY.

The parties consider each and every term, covenant, and provision of this contract to be material and reasonable.

C-22. WAIVER.

Waiver by either party of a breach of any covenant of this contract will not be construed to be a continuing waiver of any subsequent breach. COUNTY's receipt of consideration with knowledge of CONTRACTOR's violation of a covenant does not waive its right to enforce any covenant of this contract. The parties shall not waive any provisions of this contract unless the waiver is in writing and signed by all parties.

C-23. AUTHORITY AND CAPACITY.

CONTRACTOR and CONTRACTOR's signatory each warrant and represent that each has full authority and capacity to enter into this contract.

C-24. BINDING ON SUCCESSORS.

All of the conditions, covenants and terms herein contained shall apply to, and bind, the heirs, successors, executors, administrators and assigns of CONTRACTOR. CONTRACTOR and all of CONTRACTOR's heirs, successors, executors, administrators, and assigns shall be jointly and severally liable under this contract.

C-25. CUMULATION OF REMEDIES.

All of the various rights, options, elections, powers and remedies of the parties shall be construed as cumulative, and no one of them exclusive of any other or of any other legal or equitable remedy which a party might otherwise have in the event of a breach or default of any condition, covenant or term by the other party. The exercise of any single right, option, election, power or remedy shall not, in any way, impair any other right, option, election, power or remedy until all duties and obligations imposed shall have been fully performed.

C-26. INDEPENDENT ADVICE.

Each party hereby represents and warrants that in executing this contract it does so with full knowledge of the rights and duties it may have with respect to the other. Each party also

represents and warrants that it has received independent legal advice from its attorney with respect to the matters set forth in this contract and the rights and duties arising out of this contract, or that such party willingly foregoes any such consultation.

C-27. NO RELIANCE ON REPRESENTATIONS.

Each party hereby represents and warrants that it is not relying, and has not relied, upon any representation or statement made by the other party with respect to the facts involved or its rights or duties. Each party understands and agrees that the facts relevant, or believed to be relevant to this contract may hereunder turn out to be other than, or different from the facts now known to such party as true, or believed by such party to be true. The parties expressly assume the risk of the facts turning out to be different and agree that this contract shall be effective in all respects and shall not be subject to rescission by reason of any such difference in facts.

C-28. REDUCTION OF CONSIDERATION.

CONTRACTOR agrees that COUNTY shall have the right to deduct from any payments specified in Attachment B any amount owed to COUNTY by CONTRACTOR as a result of any obligation arising prior to, or after, the execution of this contract. For purposes of this paragraph, obligations arising prior to, or after, the execution of this contract may include, without limitation, any property tax, secured or unsecured, which tax is in arrears. If COUNTY exercises the right to reduce the consideration specified in Attachment B, COUNTY, at the time of making a reduced payment, shall give CONTRACTOR notice of the amount of any off-set and the reason for the reduction.

C-29. COUNTERPARTS.

This contract may be executed in any number of counterparts, each of which so executed shall be deemed to be an original. The counterparts shall together constitute one contract.

END OF ATTACHMENT C.

ATTACHMENT D
Specific Terms and Conditions

The LSSI Proposal is attached herein as Attachment D.

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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5 Firm Name and Contact Information

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Appendix A Sample Needs Assessment and Strategic Plan

Appendix B Project Staff Resumes

Appendix C Sample General IT Assessment Overview

Appendix D Sample Survey

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.

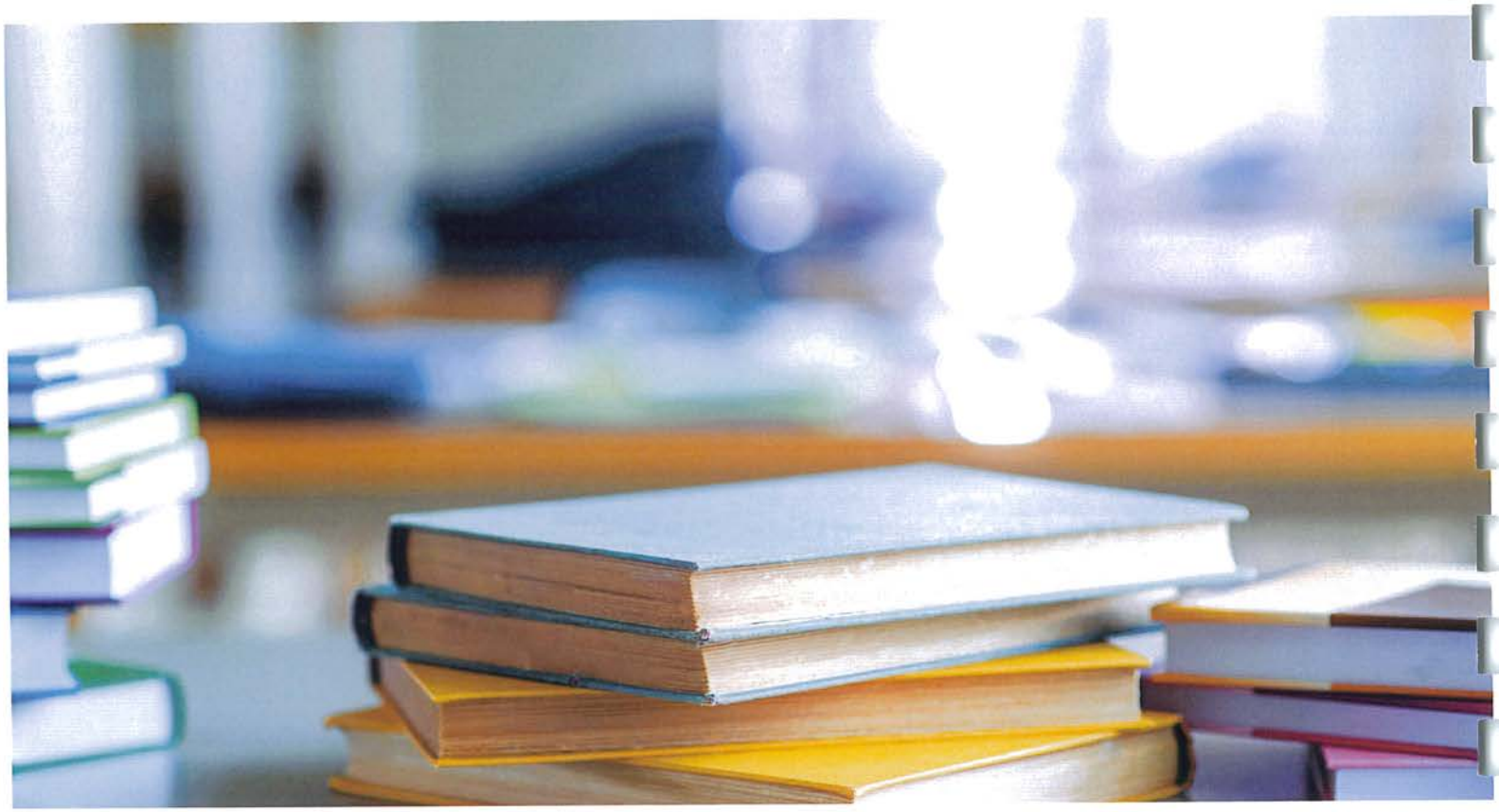
Sincerely,

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

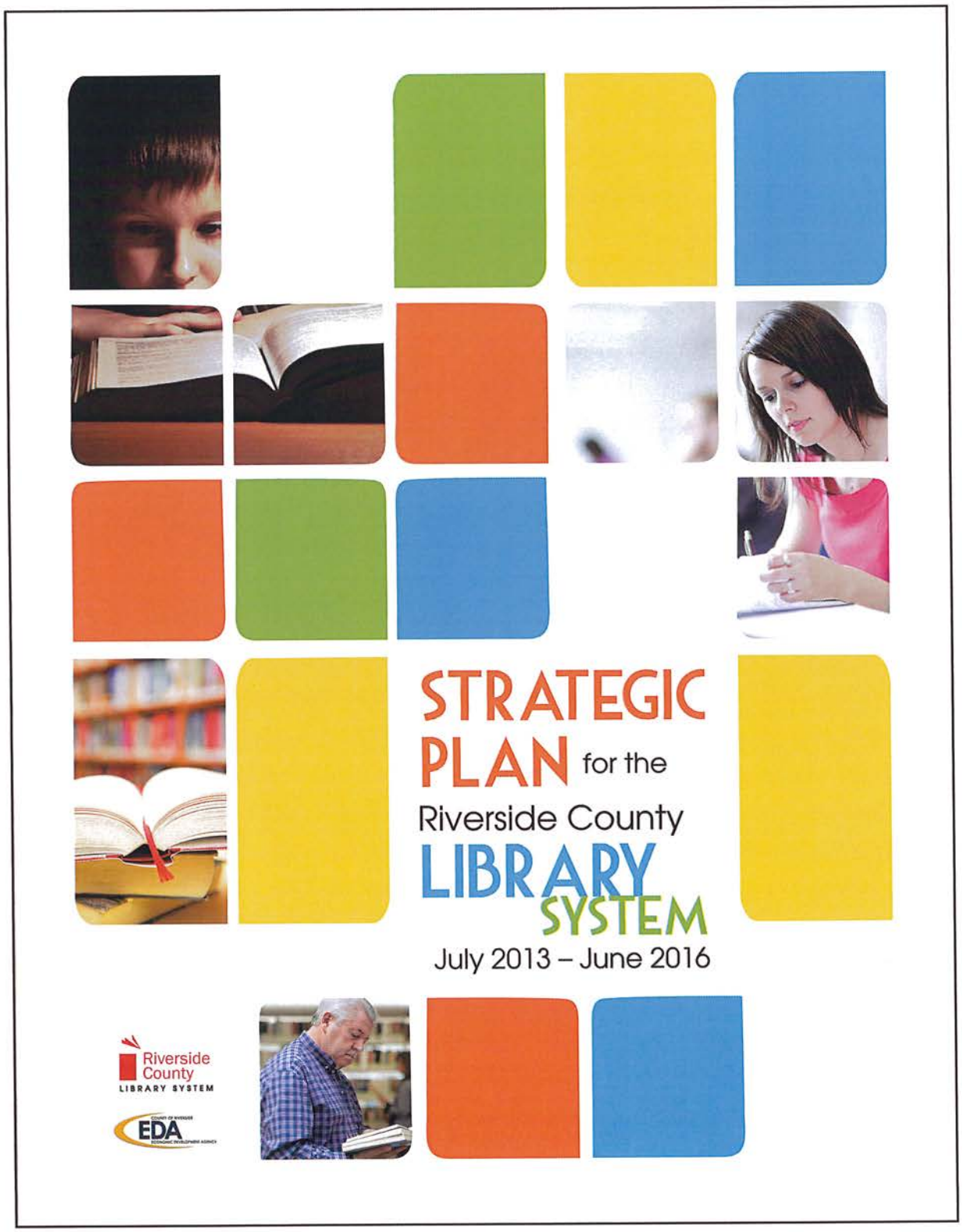
A campus environment, which would group municipal services in a single site, has advantages. In addition to shared sidewalks and walkways, parking spaces can be shared, and made available for library use after business hours. Consolidating municipal activities also allows some sharing of space such as 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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SECTION 2 THE LIBRARY AND COMMUNITY

Mission and Vision Statement

Riverside County Library System description

Organization chart

Map of County of Riverside Libraries

SECTION 3 OUR 3-YEAR STRATEGIC GOALS

Tell Our Story: Network With Our Communities

Visit a Comfortable and Safe Place

Satisfy curiosity: Lifelong Learning

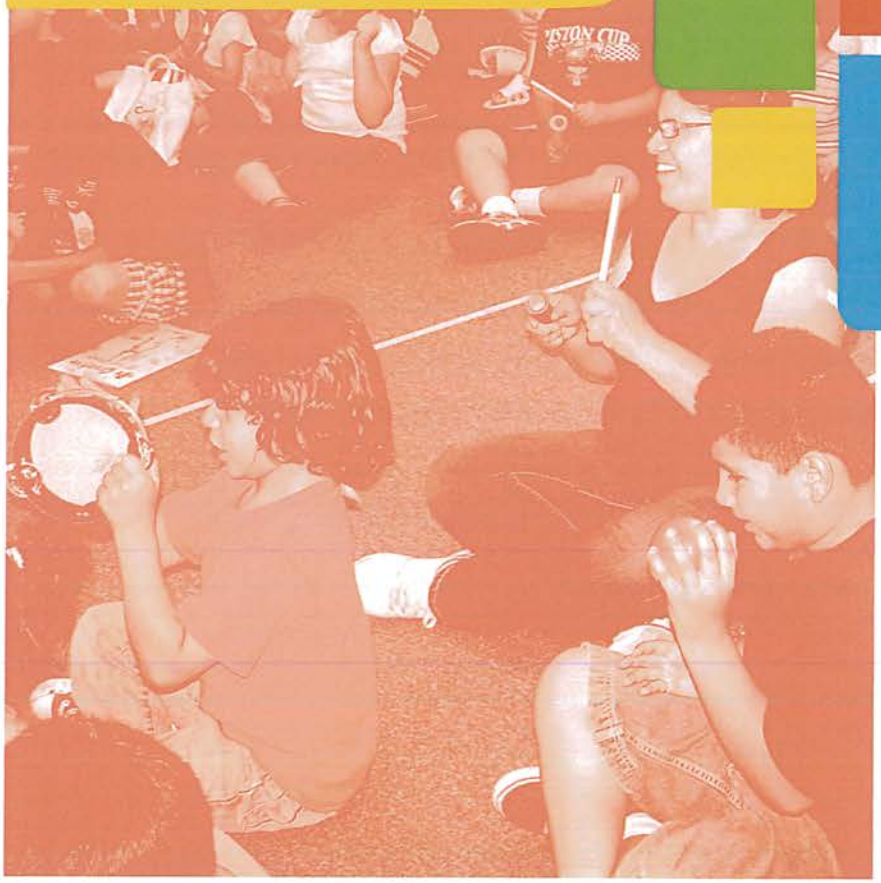
Children and Teens

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

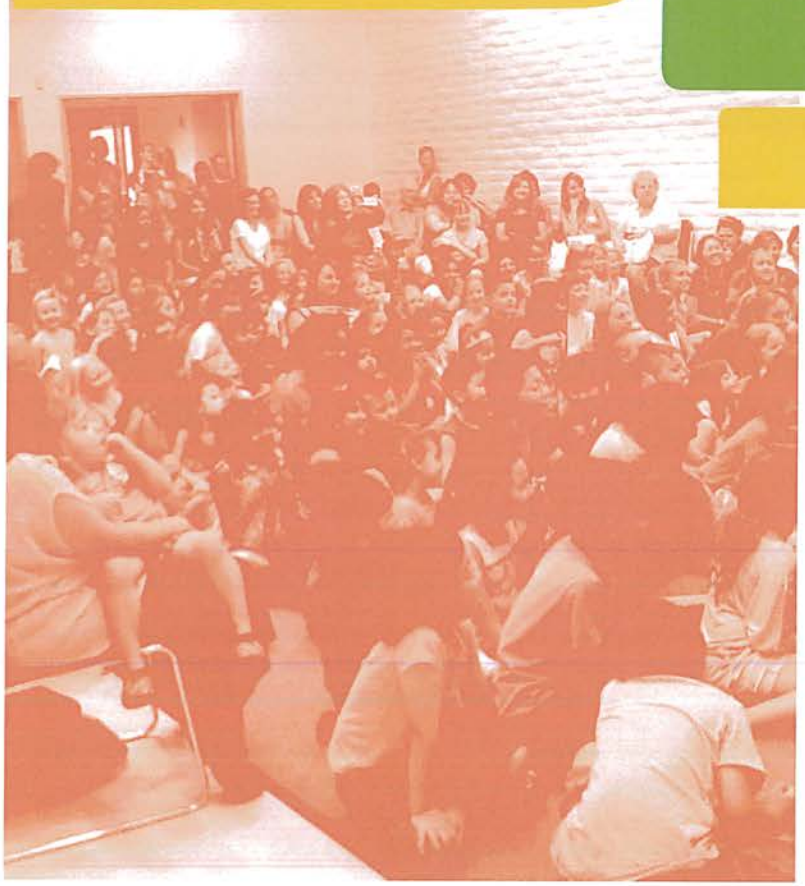
Community Focus Group Members

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.

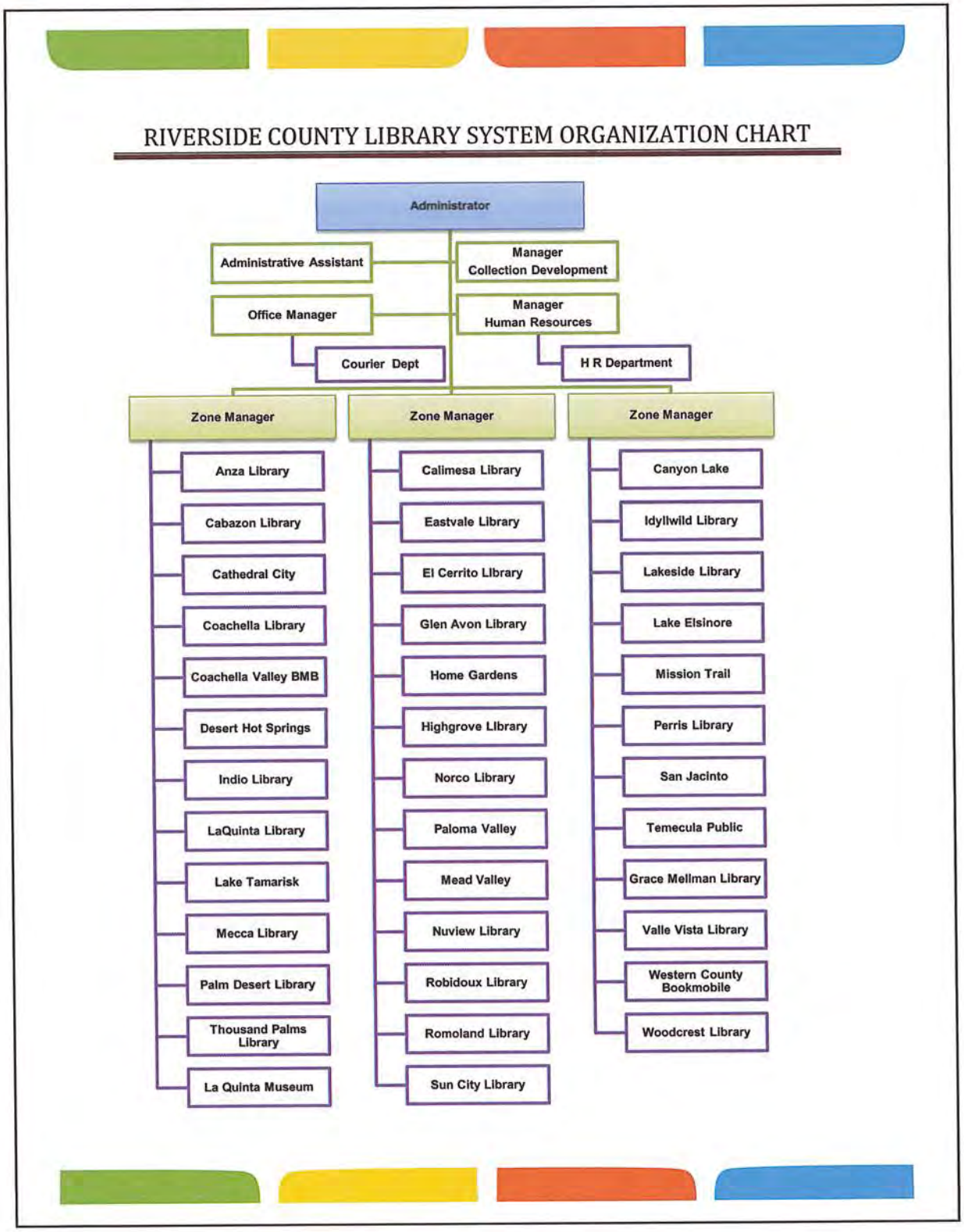
Along with many useful databases with access from every library and some from remote (including home) computers, RCLS offers Brainfuse HelpNow. This is a comprehensive suite of online academic services designed to support many learning needs and styles—live online homework help, academic skills-building,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

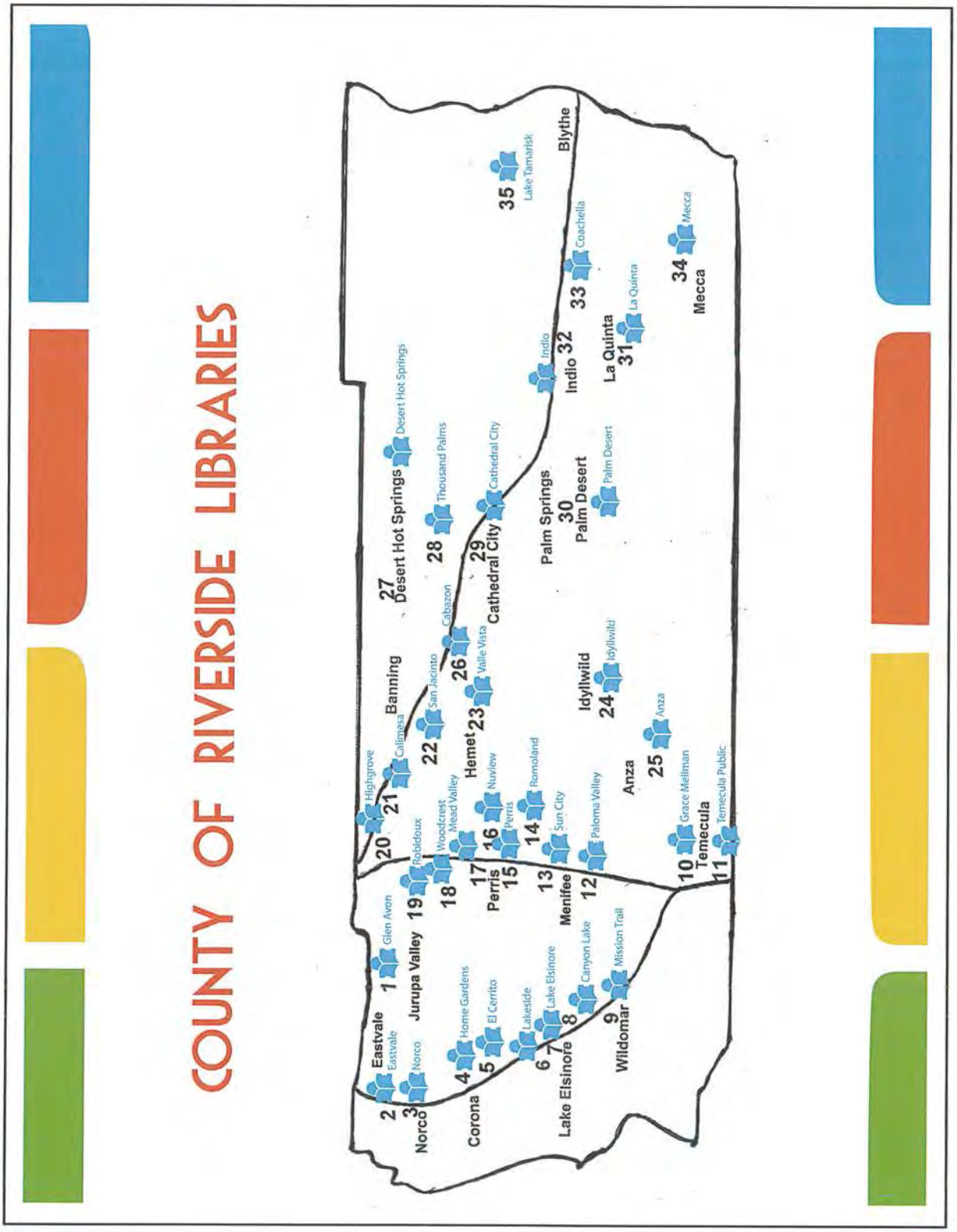
Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

Riverside Strategic Plan



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

Riverside Strategic Plan

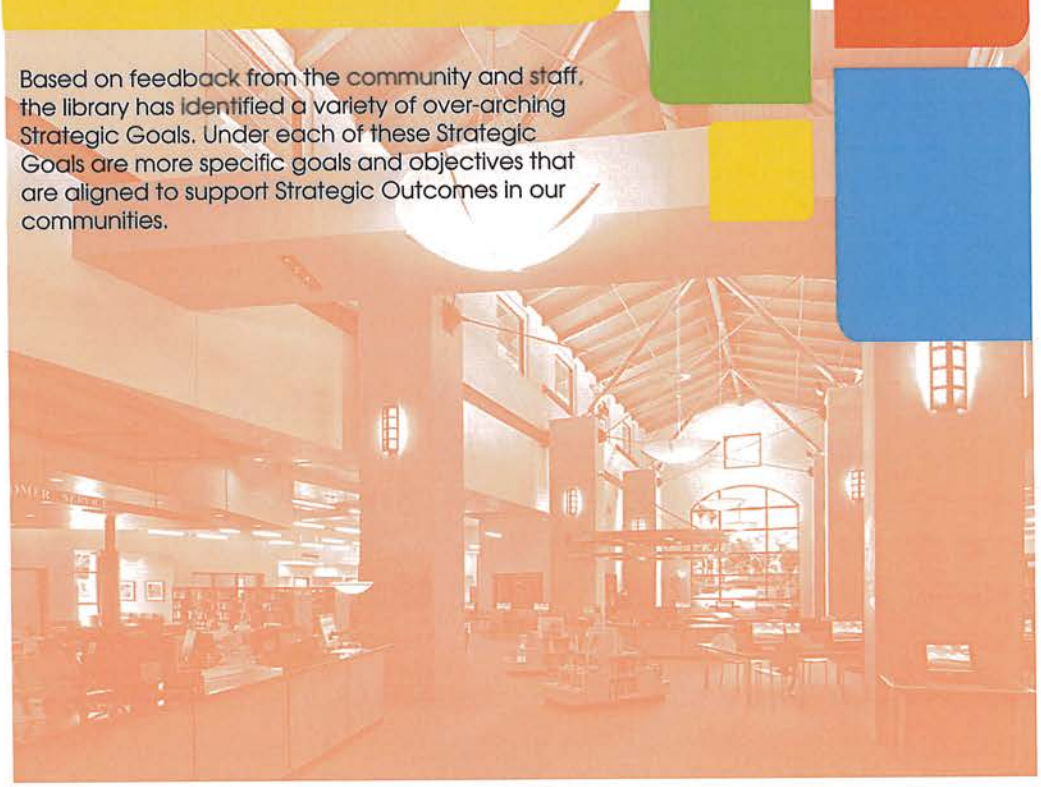


Appendix A – Sample Needs Assessments & Strategic Plan by LS&S

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?