



**PACIFIC LIBRARY PARTNERSHIP:
MEETING THE CHALLENGE**

April 2010



MANAGEMENT PARTNERS
INCORPORATED



MANAGEMENT PARTNERS

INCORPORATED

April 14, 2010

Ms. Linda Crowe
Executive Director
Pacific Library Partnership
2471 Flores Street
San Mateo, CA 94403-2273

Dear PLP Strategic Planning Project Team Members:

Management Partners is pleased to provide this strategic plan to you. This document, *Pacific Library Partnership: Meeting the Challenge*, is the result of broad-based input and two facilitated planning sessions designed to establish a clear vision for the organization.

Consistent themes important to shaping the future of the PLP emerged during the planning process. They include collaboration, innovation and effective communication and are reflected in the PLP vision statement and supporting mission and values. Five goals were identified that will contribute to achieving the vision. The goals reflect input received through an online survey of library directors and key staff in member libraries and address the following areas of interest: organization, shared resources, innovation, communication, and advocacy. Specific strategies to achieve the goals are included in the document and will be prioritized as the implementation plan is developed.

In addition to stating the outcomes of the collaborative work, the strategic plan also provides a record of the process. The important elements of the plan (PLP vision statement, mission statement, values, goals and strategies) are contained in the first section for quick reference and use. The second section provides an overview of the process and key activities that were completed to prepare this plan.

We have included the background and interim process documents as attachments. These include the results of the online survey; a participant briefing book that was distributed to those involved in the strategic planning workshops; workshop meeting summaries; and a roster of workshop participants.

We have incorporated the revisions you provided. Please let Amy Paul or Nancy Hetrick know if you have any additional changes or comments. We look forward to continuing to assist with the implementation effort.

Sincerely,

Gerald E. Newfarmer
President and CEO

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PLP: Meeting the Challenge

The Pacific Library Partnership (PLP) is committed to achieving a shared vision for the organization and its members. The vision, mission and values below are a result of a thoughtful and inclusive process designed to set the PLP on a course that meets the challenges of the future.

VISION STATEMENT

Strengthening libraries strategically through innovation and collaboration.

MISSION STATEMENT

PLP builds a collaborative library community by leveraging resources, promoting research, and developing programs and services to effectively and efficiently serve its members.

OUR VALUES

- *Collaboration*
- *Diversity*
- *Efficiency*
- *Effectiveness*
- *Forward Thinking and Risk-Taking*
- *Responsiveness*
- *Return on Investment*

GOALS AND STRATEGIES

Well-defined goals provide the focus for an organization to achieve its vision. Therefore, participants at both strategic planning workshops spent time contemplating and discussing them. The following goals and strategies were established to achieve the desired future communicated through the PLP vision statement.

Organization

Goal A: *Become a nimble and sustainable organization.*

Strategies

1. Define roles, responsibilities and the benefits of PLP
2. Develop a fair and sustainable funding structure
3. Develop and implement a comprehensive communication plan
4. Leverage the use of technology

Shared Resources

Goal B: *Share resources and expertise.*

Strategies

1. Identify current and new resources for sharing and develop implementation plan
2. Create a database/exchange to offer/solicit resources and expertise
3. Create communities of interest to share best practices
4. Foster skill development and mentoring

Innovation

Goal C: *Create opportunities to develop and provide entrepreneurial and innovative services.*

Strategies

1. Fund an innovations grant program
2. Fund a loan program
3. Form a PLP think tank as a resource to identify and respond to emerging trends and issues
4. Apply entrepreneurial strategies for revenue
5. Identify partnerships with local government, universities and business

Communication

Goal D: *Promote and market library services.*

Strategies

1. Conduct a needs assessment
2. Provide training on promotion and marketing to library staffs
3. Provide communication and marketing expertise to libraries
4. Partner with chambers of commerce, convention and visitors bureaus, and professional associations (i.e., League of CA Cities, CSAC, CPRS, IT Directors, etc.) to promote libraries
5. Develop multi-system campaigns to promote and market library services to local medias

Advocacy

Goal E: Advocate for libraries on a state and regional level on behalf of PLP members.

Strategies

1. Represent PLP to State Library
2. Provide crisis management support to members
3. Be a clearinghouse for information and resources
4. Provide representatives to legislative committees (CLA; ALA)
5. Identify other organizations that PLP could link with to advocate about common interests (connect organizations such as CALIFA, League of California Cities, CSAC, etc.)

Strategic Planning Process Overview

In November 2009, the PLP Executive Committee engaged Management Partners to assist in a collaborative effort to design and facilitate a strategic planning process to develop a shared vision for the organization. The PLP project team consisted of Jane Light, President of PLP; Karen Burnett, Director of Mountain View Public Library; Donna Corbeil, Director of Berkeley Public Library; and Monique A. le Conge, Director of Richmond Public Library. Staff included Linda Crowe, Wendy Cao, and Terry Jackson.

A collaborative and inclusive process was used to identify those elements that are most important to achieving a successful future for the PLP. The strategic planning process consisted of the following activities:

- Conducted telephone interviews with the Executive Committee members and two additional directors to identify the strengths, weaknesses, opportunities and threats (SWOT) of the PLP, words that describe the vision, mission and values of the PLP and its members, and current and anticipated challenges (December).
- Developed and administered an online survey that was distributed to all directors, key personnel, and existing System Committee members (January). The results are included within Attachment A, Participant Briefing Book.
- Conducted an environmental scan of current and anticipated challenges facing member libraries through the online survey (January). The results are included within Attachment A, Participant Briefing Book.
- Designed and distributed a Participant Briefing Book. The briefing book included background information about the PLP, survey results and words that reflect the vision, mission and values. The briefing book also included assignments for advance work in preparation for the first of two workshops (February). The Participant Briefing Book is included as Attachment A.
- Held a workshop on Monday, February 8 at the San Jose Public Library. Twenty-four library directors and staff participated. The agenda included a presentation of the interview summary, survey results and environmental scan as a discussion aid to identify challenges and opportunities facing PLP. Drafts of vision, mission, values

and goals for the next three to five years were developed. The agenda and meeting notes are included as Attachment B.

- Held a second workshop on Monday, March 1 at the San Jose Public Library. Fifteen library directors and staff participated. The workshop included validating work completed during the first workshop, refining the goals and establishing strategies to achieve the goals. The agenda and meeting notes are included as Attachment C.
- Distributed online survey to directors, key personnel, and existing System Committee members to solicit feedback about the draft vision, mission, values, and goals.
- Developed a draft strategic plan for review by the PLP Executive Committee and Project Team members.
- Reported on feedback on the draft plan that was received through the online survey.
- Revised the strategic plan to incorporate changes provided by the PLP Executive Committee.

Next Steps

The realization of the vision set forth in this document will require an annual plan that prioritizes the activities and tasks to further the strategies as well as respect the values and mission of the PLP. It is imperative that the organizational strategies be implemented in the first year in order to build a strong sustainable organization that meets the needs of its members. Ensuring the viability of the PLP and the perceived value it offers its members will lay the foundation to pursue other goals identified as important to achieving the vision.

The following next steps will begin to implement this strategic plan.

- Present the Strategic Plan to PLP Directors.
- Use these documents in the PLP Plan of Service to be submitted to the State Library.
- Present these documents with a keynote address at the PLP Annual meeting scheduled for Friday, May 14, 2010 at the Milpitas Library.
- Develop an action plan for presentation at Annual Meeting.

The energy and enthusiasm generated during the strategic planning workshops provides an excellent starting point for the work that remains to complete the plan, develop unified action steps, establish priorities for each of goals, and make the vision a reality.

Attachment A – Workshop Participant Briefing Book

Pacific Library Partnership: Meeting the Challenge Participant Briefing Book

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About this Briefing Book

Management Partners is helping the PLP plan and facilitate the process for defining how to Meet the Challenge and define the organization's future. Nancy Hetrick and Amy Paul have been working with a Project Team to plan the activities that will lead to some of the answers to the question: What are the best ways for PLP to "Meet the Challenge" and help members meet their challenges?

After an initial meeting with the Project Team, Nancy and Amy interviewed the Executive Committee and two other PLP members to hear their views about:

- Strengths, weaknesses, opportunities and threats
- Words that express the vision, mission and values of the PLP
- Challenges that libraries are facing today and those that are likely to be faced in five years, and
- Issues that they feel will be important to address during the planning effort.

The answers from the interviews were used to develop an online survey that was sent to library directors and librarians in the PLP. (Directors were invited to ask as many staff as they liked to complete the survey. Over 100 people responded to the survey.) Responses to the survey are included in this Briefing Book and begin on page 20.

This Briefing Book is meant to help directors who attend the Meeting the Challenge Workshop on February 8 be prepared so that the time is well-spent. We ask that you review the contents and answer the questions that are posed. If you have any questions, please call Nancy Hetrick at 408 437-5400 or Amy Paul at 513 309-3709.

Please complete the questions that are posed in this Briefing Book.
Bring it with you when you come to the Workshop on February 8.
Your thoughtfulness is appreciated and will enhance the experience.

Introduction to the PLP Planning Process And the Journey Begins...

Dear PLP Directors,

The PLP Executive Committee met on Monday, November 23, 2009. At their meeting, the Executive Committee approved a PLP strategic planning process which has been titled: "PLP: Meeting the Challenge." We have engaged the services of Management Partners, Inc. The project team consists of Amy Paul, Corporate Vice-President and Nancy Hetrick, Senior Manager, of Management Partners. PLP is represented on the project team by Jane Light, President of PLP and Karen Burnett, Director of Mountain View Public Library. Staff includes Linda Crowe, Wendy Cao, and Terry Jackson.

The process consists of the following:

- Telephone interviews with the Executive Committee members (already completed)
- Online survey distributed to Directors, key personnel, and existing System Committee members the first week of January (already completed)
- Environmental scan of current and anticipated challenges facing member libraries through the online survey (already completed)
- First workshop scheduled for **Monday, February 8** at San Jose Public for all Directors. Presentation of the summary of the interviews, survey results and environmental scan as a discussion aid to identify challenges and opportunities facing PLP. Drafts of values, mission statement and goals for the next three to five years will be developed as a part of this process.
- Second workshop scheduled for **Monday, March 1** at San Jose Public for all Directors. Agenda will be to confirm the goals discussed during the first workshop, establish strategies to achieve the goals and set priorities for achieving the goals.
- Develop a draft strategic plan
- Develop an implementation action plan
- Use these documents in the PLP Plan of Service to be submitted to the State Library
- Present these documents with a keynote address at the PLP Annual meeting scheduled for Friday, May 14, 2010 at the Milpitas Library.

Thank you in advance for your participation. It is critical to the success of the process and the outcomes.

Linda Crowe

Overview of the Pacific Library Partnership (PLP White paper)

PURPOSE

The Pacific Library Partnership is a consolidation of four library systems, BALIS (Bay Area Library and Information System), serving Alameda, Contra Costa, and San Francisco Counties; PLS (Peninsula Library System), serving San Mateo County; MOBAC (Monterey Bay Area Cooperative Library System), serving Monterey, Santa Cruz, and San Benito Counties; and SVLS (Silicon Valley Library System), serving Santa Clara County.

The purpose of this new consolidated regional system is to improve the services of its constituent member libraries by maintaining existing CLSA (California Library Services Act) programs, leading research and development efforts to ensure that libraries are best positioned to respond to demographic, economic, and cultural changes through innovative and collaborative approaches to programming and services and the enhancement of collective resource building and sharing.

This new system is part of a statewide effort as encouraged and supported by the California State Library to consolidate library systems throughout the state to achieve efficiencies and realize further economies of scale. There were fifteen CLSA systems in the state. Under the consolidation plan, ten of the fifteen systems consolidated into three with five independent systems remaining for a total of 8 CLSA systems.

The PLP will develop broader goals and scope than the CLSA mandated programs in communications, delivery, and reference, which are legislated by current law. The consolidation will improve and enhance services. A local system may continue local best practices to meet its own needs. This may include committee structure and programs.

BACKGROUND

In the Fall of 2006, each system selected Library Directors to represent their respective systems in the planning for the consolidation. This group, called the Fishbowl Group, met regularly since Fall 2006. The current structure called the Executive Committee is comprised of two library directors from each system. The president and vice president are elected from the eight members of the Executive Committee by all the directors at the annual PLP meeting.

The governance model for the PLP is a Joint Powers Agreement (JPA). Each of the four systems currently operates under a JPA. To join the PLP, you must be a JPA, and the Administrative Council of each system must approve their JPA joining the PLP JPA. The PLP JPA is an overarching structure; leaving the four systems' JPAs intact. The PLP JPA went into effect July 1, 2009. The JPA and bylaws are available for review.

FINANCING OF THE PLP

For the first two years of existence, there will be no increase in amount paid, as the current membership dues structure will remain in place for this time period. A Finance Committee has been appointed and will bring forward a budget for approval at the annual PLP meeting in May.

BENEFITS OF THE PLP

- The PLP will achieve economies of scale by investing in a set of shared resources in programs and services that will benefit people served by the communities in the four systems.
- The PLP will reduce duplication of effort and redundancies at the administration level as the four systems become one.
- The PLP will facilitate the ability of member libraries to work together to increase the quantity and quality of the services and programs for the people in this broader geographic area.
- The PLP will enable each member to be more responsive to the changing needs and expectations of its community.
- The PLP will create a common approach to marketing and public relations and have a shared capability for this work.
- The PLP will enable resource sharing to work better and more seamlessly.
- The PLP will allow member libraries to have a stronger, more effective and unified voice.
- The PLP will capitalize on the talents and competencies of a larger group of member library staff and increase the opportunity to share and learn from each other.
- The PLP will collaborate to invest in research and development of new initiatives and pool resources to support development of these initiatives.
- The PLP will invest in a common administrative infrastructure.
- The PLP will extend the network and communities of practices among the people who work in the member libraries.
- The PLP will provide the structure and support for member libraries with common interests to communicate and share in a broader geographical arena.

POTENTIAL NEW SERVICES TO BE EXPLORED BY THE PLP

- Programming
- Expanded Materials Delivery
- Staff Development and Continuing Education
- Support for research and development, such as an innovations Grant Program
- Technology opportunities, such as the Open Source Grant
- Communities of Interest on such topics as Friends Activities, New Facilities, Aging Facilities, New Technologies. Could be virtual and called by a convener
- Self-Selected Communities of Interest published in the Staff Directory
- Social Marketing
- Leadership Academy
- New model for resource sharing
- Shared models for the “behind the scenes” library work, centralized acquisitions, cataloging, processing of media and books, including specialized collections, i.e., foreign language

Revised 12/12/08

Listing of Libraries

System	Branch	Street	Zip	
Alameda (City)	Main/Children's	1550 Oak St.	94501	BALIS
	West End	788 Santa Clara Ave.	94501	BALIS
	Bay Farm Island	3221 Mecartney Rd.	94502	BALIS
	Alameda Reads	2203 Central Ave.	94501	BALIS
Alameda County	Administration	2450 Stevenson Blvd., Fremont	94538	BALIS
	Bookmobile			
	Albany	1247 Marin Ave.	94706	BALIS
	Castro Valley	20055 Redwood Rd.	94546	BALIS
	Dublin	200 Civic Plaza	94568	BALIS
	Fremont (Main)	2400 Stevenson Blvd.	94538	BALIS
	Fremont (Centerville)	3801 Nicolet Ave.	94536	BALIS
	Fremont (Irvington)	41825 Greenpark Dr.	94538	BALIS
	Fremont (Niles)	150 I St.	94538	BALIS
	Newark	6300 Civic Terrace Ave.	94560	BALIS
	San Lorenzo	395 Paseo Grande	94580	BALIS
	Union City	34007 Alvarado-Niles Rd.	94587	BALIS
Berkeley	Administration	2090 Kittredge at Shattuck	94704	BALIS
	Central			
	Claremont	2940 Benvenue Ave. at Ashby	94705	BALIS
	North	1170 The Alameda at Hopkins	94707	BALIS
	South	1901 Russell Street at MLK	94703	BALIS
	Tool Lending			
	West	1125 University Ave. at San Pablo	94702	BALIS
	Literacy (Berkeley Reads)			
Contra Costa County	Administration	75 Santa Barbara Rd., Pleasant Hill	94523	BALIS
	Adult Literacy: Project Second Chance			
	Antioch	501 W. 18th St.	94509	BALIS
	Bay Point	205 Pacifica Ave.	94565	BALIS
	Brentwood	751 Third St.	94513	BALIS
	Clayton	6125 Clayton Rd.	94517	BALIS
	Concord (Main)	2900 Salvio St.	94519	BALIS
	Concord (Monument Futures)	2699 Monument Blvd., Ste G	94520	BALIS
	Crockett	991 Loring Ave.	94525	BALIS
	Danville	400 Front St.	94526	BALIS
	El Cerrito	6510 Stockton Ave.	94530	BALIS
	El Sobrante	4191 Appian Way	94803	BALIS
	Hercules	109 Civic Dr.	94547	BALIS

	Kensington	61 Arlington Ave.	94707	BALIS
	Lafayette	952 Moraga Rd.	94549	BALIS
	Martinez	750 Court St.	94553	BALIS
	Moraga	1500 St. Mary's Rd.	94556	BALIS
	Oakley	1050 Neroly Rd. (Freedom HS)	94561	BALIS
	Orinda	26 Orinda Way	94563	BALIS
	Pinole	2935 Pinole Valley Rd.	94564	BALIS
	Pittsburg	80 Power Ave.	94565	BALIS
	Pleasant Hill	1750 Oak Park Blvd.	94523	BALIS
	Rodeo	220 Pacific Ave.	94572	BALIS
	San Pablo	2300 El Portal Dr.	94806	BALIS
	San Ramon (Main)	100 Montgomery St.	94583	BALIS
	San Ramon (Dougherty Station)	17017 Bollinger Canyon Rd.	94582	BALIS
	Walnut Creek (Downtown)	1644 N. Broadway	94596	BALIS
	Walnut Creek (Ygnacio Valley)	2661 Oak Grove Rd.	94598	BALIS
Hayward	Main	835 C St.	94541	BALIS
	Weekes	27300 Patrick Ave.	94544	BALIS
Livermore	Civic Center	1188 South Livermore Ave.	94550	BALIS
	Rincon	725 Rincon Ave.	94551	BALIS
	Springtown	998 Bluebell Dr.	94551	BALIS
Oakland	Main	125 14th St.	94612	BALIS
	African American Museum and Library	659 14th St.	94612	BALIS
	Dimond/American Indian Collection	3565 Fruitvale Ave.	94602	BALIS
	Asian	388 9th St., Ste 190	94607	BALIS
	Bookmobile	1801 Adeline St.	94608	BALIS
	Brookfield	9255 Edes Ave.	94603	BALIS
	César E. Chávez	3301 E 12th St., Ste. 271	94601	BALIS
	Eastmont	7200 Bancroft Ave., Ste. 211 (Eastmont TC)	94605	BALIS
	Elmhurst	1427 88th Ave.	94621	BALIS
	Golden Gate	5606 San Pablo Ave.	94608	BALIS
	Lakeview	550 El Embarcadero	94610	BALIS
	Martin Luther King Jr.	6833 International Blvd.	94621	BALIS
	Melrose	4805 Foothill Blvd.	94601	BALIS
	Montclair	1687 Mountain Blvd.	94611	BALIS
	Piedmont	160 41st St.	94611	BALIS
	Rockridge	5366 College Ave.	94618	BALIS
Temescal	5205 Telegraph Ave.	94609	BALIS	

	Tool Lending			
	West Oakland	1801 Adeline St.	94607	BALIS
	Adult Literacy (Second Start)			
Pleasanton	Main	400 Old Bernal Ave.	94566	BALIS
Richmond	Main	325 Civic Center Plaza	94804	BALIS
	Administration			
	Bayview	5100 Hartnett Ave.	94804	BALIS
	West Side	135 Washington Ave.	94801	BALIS
San Francisco Public Library	Main/Administration	100 Larkin St.	94102	BALIS
	Anza	550 37th Ave.	94121	BALIS
	Bayview/Anna E. Waden	5075 3rd St.	94124	BALIS
	Bernal Heights	500 Cortland Ave.	94110	BALIS
	Chinatown	1135 Powell St.	94108	BALIS
	Eureka Valley/Harvey Milk	1 José Sarria Ct.	94114	BALIS
	Excelsior	4400 Mission St.	94112	BALIS
	Glen Park	653 Chenery St.	94131	BALIS
	Golden Gate Valley	1801 Green St.	94123	BALIS
	Ingleside	1649 Ocean Ave.	94112	BALIS
	Marina	1890 Chestnut St.	94123	BALIS
	Merced	155 Winston Dr.	94132	BALIS
	Mission	300 Bartlett St.	94110	BALIS
	Mission Bay	960 4th St.	94158	BALIS
	Noe Valley/Sally Brunn	451 Jersey St.	94114	BALIS
	North Beach	2000 Mason St.	94133	BALIS
	Ocean View	345 Randolph St.	94132	BALIS
	Ortega	3223 Ortega St.	94122	BALIS
	Park	1833 Page St.	94117	BALIS
	Parkside	1200 Taraval St.	94116	BALIS
	Portola	2450 San Bruno Ave.	94134	BALIS
	Potrero	1616 20th St.	94107	BALIS
	Presidio	3150 Sacramento St.	94118	BALIS
	International Languages Collection			
	Richmond/Sen. Milton Marks	351 9th Ave.	94118	BALIS
	Sunset	1305 18th Ave.	94122	BALIS
Visitacion Valley	45 Leland Ave.	94134	BALIS	
West Portal	190 Lenox Way	94127	BALIS	
Western Addition	1550 Scott St.	94115	BALIS	
Western Addition Reading Center	762 Fulton St., 2nd Floor	94102	BALIS	

System	Branch	Street	Zip	
Cabrillo College Library	Main	6500 Soquel Drive, Bldg. 1000	95003	MOBAC
California State University Monterey Bay Library	Main	100 Campus Center	93955	MOBAC
Gavilan College Library	Main	5055 Santa Teresa Blvd.	95020	MOBAC
Harrison Memorial Library	Main	P.O. Box 800	93921	MOBAC
Hartnell College Library	Main	411 Central Ave.	93901	MOBAC
Monterey Bay Aquarium Library	Main	886 Cannery Row	93940	MOBAC
Monterey County Free Libraries	Administrative Office	188 Seaside Circle	93933	MOBAC
	Aromas Branch Library	387 Blohm Ave., Suite 203	95004	MOBAC
	Big Sur Branch Library	Highway 1 at Ripplewood Resort	93920	MOBAC
	Bradley Branch Library	Dixie Street	93426	MOBAC
	Buena Vista Branch Library	18250 Tara Drive	93908	MOBAC
	Carmel Valley Branch Library	65 W. Carmel Valley Road	93924	MOBAC
	Castroville Branch Library	11160 Speegle Street	95012	MOBAC
	Gonzales Branch Library	851 Fifth Street	93926	MOBAC
	Greenfield Branch Library	315 El Camino Real	93927	MOBAC
	King City Branch Library	402 Broadway	93930	MOBAC
	Marina Branch Library	190 Seaside Circle	93933	MOBAC
	Pajaro Branch Library	29 Bishop Street	95076	MOBAC
	Parkfield Branch Library	70643 Parkfield-Coalinga Road	93451	MOBAC
	Prunedale Branch Library	17822 Moro Road	93907	MOBAC
	San Ardo Branch Library	62350 College	93450	MOBAC
	San Lucas Branch Library	54692 Teresa Street	93954	MOBAC
Seaside Branch Library	550 Harcourt Ave.	93955	MOBAC	
Soledad Branch Library	401 Gabilan Drive	93960	MOBAC	
Monterey Institute of International Studies Library	Main	425 Van Buren Street	93940	MOBAC
Monterey Peninsula College Library	Main	980 Fremont Ave.	93940	MOBAC
Monterey Public Library	Main	625 Pacific Street	93940	MOBAC
Naval Postgraduate School, Dudley Knox Library	Main	411 Dyer Road, Room 110	93943	MOBAC
Pacific Grove Public Library	Main	550 Central Ave.	93950	MOBAC
Salinas Public Library	Main	110 W. San Luis Street	93901	MOBAC

Salinas Public Library	John Steinbeck Library	350 Lincoln Ave.	93901	MOBAC
	Cesar Chavez Library	615 Williams Road	93905	MOBAC
	El Gabilan Library	1400 N. Main Street	93906	MOBAC
San Benito County Free Library	Main	470 Fifth Street	95023	MOBAC
San Juan Bautista – Carl Martin Luck Memorial Library	Main	P.O. Box 1420	95045	MOBAC
Santa Cruz City-County Library System	Administration/Headquarters	1543 Pacific Ave.	95060	MOBAC
	Library Information Technology	224 Church Street	95060	MOBAC
	Aptos Branch Library	7695 Soquel Drive	95003	MOBAC
	Boulder Creek Branch Library	13390 West Park Ave.	95006	MOBAC
	Branciforte Branch Library	230 Gault Street	95062	MOBAC
	Capitola Branch Library	2005 Wharf Road	95010	MOBAC
	Central Branch Library	224 Church Street	95060	MOBAC
	Felton Branch Library	6299 Gushee	95018	MOBAC
	Garfield Park Branch Library	705 Woodrow	95060	MOBAC
	La Selva Beach Branch Library	316 Estrella Ave.	95076	MOBAC
	Live Oak Branch Library	2380 Portola Drive	95062	MOBAC
	Outreach Services	1543 Pacific Ave.	95060	MOBAC
	Scotts Valley Branch Library	Kings Village Shopping Center	95066	MOBAC
UC Santa Cruz University Library	McHenry	1156 High Street	95064	MOBAC
	Science & Engineering Library			
Watsonville Public Library	Main	275 Main Street, Suite 100	95076	MOBAC
	Freedom Branch	2021 Freedom Blvd.	95019	MOBAC

System	Branch	Street	Zip	
Burlingame	Main	480 Primrose Rd.	94010	PLS
	Easton	1800 Easton Dr.	94010	PLS
Daly City	(Main) Serramonte	40 Wembley Dr.	94015	PLS
	Bayshore	460 Martin St.	94014	PLS
	John D. Daly	134 Hillsdale Blvd.	94014	PLS
	Westlake	275 Southgate Ave.	94015	PLS
Menlo Park	Main	800 Alma St.	94025	PLS
	Belle Haven	413 Ivy Dr.	94025	PLS
Redwood City	Main	1044 Middlefield Rd.	94063	PLS
	Fair Oaks	2510 Middlefield Rd.	94063	PLS
	Redwood Shores	399 Marine Parkway	94065	PLS

	Schaberg Branch	2140 Euclid Ave.	94061	PLS
San Bruno	Main	701 Angus Ave. W.	94066	PLS
San Mateo City	Main	55 W. 3rd Ave.	94402	PLS
	Hillsdale	205 W. Hillsdale Blvd.	94403	PLS
	Marina	1530 Susan Ct.	94403	PLS
San Mateo County	Atherton	2 Dinkelspiel Station Ln.	94027	PLS
	Belmont	1110 Alameda de las Pulgas	94002	PLS
	Half Moon Bay/Bookmobile	620 Correa	94019	PLS
	Brisbane	250 Visitacion Ave.	94005	PLS
	East Palo Alto	2415 University Ave.	94303	PLS
	Foster City	1000 E. Hillsdale Blvd.	94404	PLS
	Millbrae	1 Library Avenue	94030	PLS
	Pacifica (Sanchez)	1111 Terra Nova Blvd.	94404	PLS
	Pacifica (Sharp Park)	104 Hilton Way	94404	PLS
	Portola Valley	765 Portola Road	94028	PLS
	San Carlos	610 Elm St.	94070	PLS
	Woodside	3140 Woodside Rd.	94062	PLS
South San Francisco	Main	840 W. Orange Ave.	94080	PLS
	Grand Avenue	306 Walnut Ave.	94080	PLS
	Community Learning Ctr.	520 Tamarack Ln.	94080	PLS
San Mateo County Colleges	Cañada College	4200 Farm Hill Blvd., Redwood City	94061	PLS
	College of San Mateo	1700 W. Hillsdale Blvd., San Mateo	94402	PLS
	Skyline College	3300 College Dr. San Bruno	94066	PLS

System	Branch	Street	Zip	
Los Gatos	Main	110 E. Main St.	95030	SVLS
Mountain View	Main	585 Franklin St.	94041	SVLS
Palo Alto	Main	1213 Newell Rd.	94303	SVLS
	Children's	1276 Harriet St.	94301	SVLS
	College Terrace	2300 Wellesley Ave.	94306	SVLS
	Downtown (Administration)	270 Forest Ave.	94301	SVLS
	Mitchell Park	3700 Middlefield Rd.	94303	SVLS
San Jose	Administration	150 E. San Fernando St.	95112	SVLS
	Main (Dr. MLK, Jr.)	150 E. San Fernando St.	95112	SVLS
	Almaden	6445 Camden Ave.	95120	SVLS
	Alum Rock (Dr. Roberto Cruz)	3090 Alum Rock Ave.	95127	SVLS
	Alviso	5050 North First St.	95002	SVLS

	Berryessa	3355 Noble Ave.	95132	SVLS
	Biblioteca Latinoamericana	921 S. First. St.	95110	SVLS
	Calabazas	1230 Blaney Ave.	95129	SVLS
	Cambrian	1780 Hillsdale Ave.	95124	SVLS
	East San Jose Carnegie	1102 E. Santa Clara St.	95116	SVLS
	Edenvale	101 Branham Ln E	95111	SVLS
	Educational Park	1770 Educational Park Dr.	95133	SVLS
	Evergreen	2635 Aborn Rd.	95121	SVLS
	Hillview	1600 Hopkins Dr.	95122	SVLS
	Joyce Ellington	491 E Empire St.	95112	SVLS
	Pearl Avenue	4270 Pearl Ave.	95136	SVLS
	Rose Garden	1580 Naglee Ave.	95126	SVLS
	Santa Teresa	290 International Circle	95119	SVLS
	Seventrees	3597 Cas Dr.	95111	SVLS
	Tully	880 Tully Rd.	95111	SVLS
	Vineland	1450 Blossom Hill Rd.	95118	SVLS
	West Valley	1243 San Tomas Aquino Rd.	95117	SVLS
	Willow Glen	1157 Minnesota Ave.	95125	SVLS
Santa Clara City	Central Park	2635 Homestead Rd.	95051	SVLS
	Mission	1098 Lexington St.	95050	SVLS
Santa Clara County	Administration	14600 Winchester Blvd., Los Gatos	95032	SVLS
	Campbell	77 Harrison Ave.	95008	SVLS
Santa Clara County	Cupertino	10800 Torre Ave.	95014	SVLS
	Gilroy	7387 Rosanna St.	95020	SVLS
	Los Altos (Main)	13 South San Antonio Rd.	94022	SVLS
	Los Altos (Woodland)	1975 Grant Rd.	94024	SVLS
	Milpitas	160 North Milpitas Blvd.	95035	SVLS
	Morgan Hill	660 West Main Ave.	95037	SVLS
	Saratoga	13650 Saratoga Ave.	95070	SVLS
	Vision Literacy	540 Valley Way, Building 4	95035	SVLS
Sunnyvale	Main	665 W. Olive Ave.	94086	SVLS

PLP: Meeting the Challenge Workshop February 8, 2010

Location: San Jose Public Library Dr. Martin Luther King Jr.
150 E. San Fernando Street, San Jose
King Library Boardroom

Agenda

Workshop Facilitators: Amy Paul and Nancy Hetrick from Management Partners

- 9:00 – 9:45 Introduction from Jane Light, PLP President
Warm Up
- Review Agenda
 - Agree on Norms
- 9:45 – 10:45 Discuss Vision and Mission (in small groups)
- Break
- 11:00 – 11:30 Identify Values
- 11:30 – 12:15 Review Themes and Survey Data
- Working Lunch Discuss Potential Goals based on Themes that Emerged from the Survey Data (in small groups)
- 2:00 – 3:00 Share Potential Goals with Entire Group
- Break
- 3:15 – 3:45 Combine/Refine/Goal List
- 3:45 – 4:00 Discuss Next Steps
- PLP wordsmiths vision, mission and goal statements before the next meeting
 - Possible Advance Work for next meeting **on March 1, 2010**
- 4:00 Adjourn

Common Strategic Planning Language

A strategic planning process involves establishing a clear mission for the organization, a vision for the future, preparing an environmental scan that identifies the factors affecting the organization, goals, and priority strategies. A **mission** statement provides the framework and direction for the organization. It states the purpose and provides the marketing focus. The mission statement gives a rationale for programs that are carried out by the organization, and guides the prioritization of opportunities. It fundamentally defines what the organization stands for and what it will do. Establishing a **vision** of where the organization wants to be in the future is a fundamental part of the strategic planning process. Where the mission states the purpose of the organization, the vision states the future. The **values** of an organization drive both the goals and strategies created and the process of implementing the strategic plan. They describe what the organization stands for and what their members believe in. Values form the basis of behaviors and drive interactions and communication.

An **environmental scan** is normally conducted as part of a strategic planning process to identify the factors that are currently influencing the organization and those which will affect it in the future. Typical factors include fiscal constraints and opportunities, service demand drivers, policy issues, legislation, demographic characteristics of the community, and workforce issues. A “SWOT” analysis (strengths, weaknesses, opportunities, threats) is normally part of the environmental scan.

Goals set the framework for policies that guide the direction and focus of the organization, budget decisions and allocation of other resources, such as staff time. Goals are “up on the balcony” wide views of opportunities for change and improvement. They are statements of how you want the future to be. Goals provide the “why” (larger meaning and context) of the specific actions the agency takes. They help the management team, and Council, when they are involved, to decide which of the many worthy projects should be done and when, within available resources. Goals must be meaningful and attainable.

Strategies are the means to achieve the goals. They are the individual projects that must be assigned, with resources identified, which will contribute to achievement of a goal. Projects should be achievable within the available resources, with clear direction and attainable timeframes, with periodic checking in about progress, changes or challenges.

Definitions in Brief	
Vision	Where the organization wants to be in the future
Mission	Describes what we do and why we do it
Values	Describe what the organization stands for and what its members believes in
Goals	Statements of how you want the future to be
Strategies	Describe the means to achieve the goals

Vision, Mission and Values

(Words identified during interviews)

A **vision** describes what the organization wants to become in the future. It is meant to be inspirational so members are inspired to create the organization they would want to have. The following words were suggested by library directors who were interviewed about the PLP when they were asked to think about how they would express the vision of PLP.

Vision (Words that express the vision of PLP)

Serving communities	Power	Best practices
Working together	Big Picture	Innovation
Positive change	Strategic	Evolving
One library/Your library	Learning	Partnership
Silent partner	Collaboration	Expertise
Indirect support	Constant change	One voice
Strength	Invigorating	

Activity: Review the list of words above and write a phrase that articulates your vision for the PLP. Bring this with you to the Meeting the Challenge Workshop on February.

A **mission** provides the framework and direction for the organization. It describes what the organization does and why. The following words were suggested by library directors who were interviewed about the PLP.

Mission (Words that express the mission of PLP)

Flexibility	Nimble response to challenges faced by members	Communication
Responding to changing conditions	Creative	Community building
Working efficiently and effectively together	Collective	Networking
Bringing libraries together	Innovative	Information-sharing
Providing new and exciting services	Helping	Knowledge-sharing
	Leveraging resources	Supportive
	Efficiency	Common interests
		Cost effectiveness

Activity: Review the list of words above and write a phrase that expresses what you think should be the mission of the PLP. Bring it with you to the Meeting the Challenge Workshop.

Values describe what the organization stands for and what its members believe in. Values form the basis of behaviors and drive interactions and communication. The following values were suggested by library directors who were asked, “What should be the values of the PLP?”

Values (Words that express the values of PLP)

Respect	Transparency	Patron-centric
Trust	Collaborative	Equity
Teamwork	Responsiveness	Diversity
Unified voice	Effectiveness	Return on investment
Accountability	Efficiency	Mindful of differences
Collegiality	Support	Free libraries
Sharing	Feedback	Our libraries come first
Commitment	Assessment	

Activity: Review the list of words above and circle those that you would like to see as part of a values statement of the PLP. Bring it with you to the Meeting the Challenge Workshop.

PLP: Meeting the Challenge – Summary of Survey Results

Survey Respondents

A total of 122 people responded to at least a portion of the online survey. Over 100 people responded to all formal questions. The total number of possible respondents is not known, however 122 is a good sample size and the distribution among the library systems and between directors and staff appears to be balanced and representative. Eight-three percent of the responses came from non-library directors while the remainder reported they currently serve as a director. Silicon Valley Library System (SVLS) had the largest percentage of respondents (30.5%), followed by Peninsula Library System (PLS), Monterey Bay Area Cooperative Library System (MOBAC) and Bay Area Library and Information System (BALIS). The distribution of responses is shown below in Table 1.

Table 1: To which of the Following Library Systems do You Belong?

Answer Options	Response Percent	Response Count
MOBAC (Monterey Bay Area Cooperative Library System)	22.9%	24
SVLS (Silicon Valley Library System)	30.5%	32
PLS (Peninsula Library System)	24.8%	26
BALIS (Bay Area Library and Information System)	21.9%	23

The greatest number of respondents (65.7%) reported working for a medium-sized library, followed by small libraries (22.5%), then large libraries (11.8%). Table 2 shows the distribution of responses.

Table 2: What is the Size of Your Library?

Answer Options	Response Percent	Response Count
Small (serves a population of under 50,000)	22.5%	23
Medium (serves a population of 50,000 to 499,999)	65.7%	67
Large (serves over 500,000 population)	11.8%	12

Strengths, Weaknesses, Opportunities and Threats (SWOT)

Survey respondents were asked to indicate if they strongly agree, agree, disagree or strongly disagree with strengths, weaknesses, opportunities, and threats that were identified in a series of interviews conducted with the executive board of the PLP. The following tables show the percent of respondents who either agree or strongly agree with the assessment. We have included the percentages for all respondents, library directors only, and non-library directors to surface areas of consensus and disagreement. The areas where over 90% agree or strongly agree with the statement may be useful to highlight for PLP planning purposes. By contrast, those areas where fewer than 50% agree or strongly agree may be areas that are less useful. This may be particularly true for the question regarding opportunities for the PLP.

Strengths

Table 3 shows the percent of respondents who agree or strongly agree with strengths identified during interviews. Additional comments offered by survey respondents are summarized following each element of the SWOT analysis.

Table 3: Strengths

Answer Options	% Responding Agree or Strongly Agree		
	ALL Respondents	Directors Only	Non-Directors Only
1. Creative, talented staff	94.0%	87.5%	95.3%
2. Library leadership	86.2%	93.8%	83.5%
3. Tradition of forward-thinking	82.3%	93.8%	80.0%
4. Commitment of the Executive Team	87.4%	100.0%	86.7%
5. Size/economies of scale	85.3%	93.3%	86.6%
6. Large regional ties are positive	92.0%	100.0%	91.7%
7. Strong relationship with the state library	90.6%	100.0%	89.6%
8. Ability to have a good PR campaign	75.0%	81.3%	72.5%
9. Advocacy at the local, state and federal levels	88.2%	100.0%	87.7%
10. More programming opportunities from which to choose	81.4%	93.8%	81.2%
11. Larger group can get better prices from vendors	97.4%	100.0%	97.6%
12. Easier to pitch funding requests to corporate sponsors for larger group	85.0%	93.8%	87.2%
13. Ability to identify new and cutting-edge technology	88.4%	93.8%	86.7%
14. IT expertise in the systems	78.6%	93.8%	74.7%
15. Staff development opportunities	86.0%	80.0%	88.4%
16. Networking	91.2%	93.8%	92.8%
17. Access to higher quality speakers/trainers with bigger audience	85.5%	81.3%	87.8%
18. Forums for directors to talk to each other	88.6%	93.3%	88.5%
19. CALIFA connection	91.1%	93.8%	94.0%
20. Variety and quality of facilities to hold programs/training	82.5%	87.5%	83.7%
21. Shared media market	83.3%	80.0%	85.9%
22. Ability to take advantage of PLP procurement process requirements in "home" jurisdictions	83.5%	86.7%	85.1%
23. Inter-library loan program	78.2%	68.8%	79.5%

A total of 119 people responded to the questions about the strengths of the PLP. The strengths receiving the highest percent of overall respondents reporting they agree or strongly agree include:

- Larger group can get better prices from vendors
- Creative, talented staff
- Large regional ties are positive
- Networking
- CALIFA connection
- Strong relationship with the state library

In addition, 100% of directors responding to the survey agreed or strongly agreed with the following statements:

- Commitment of the Executive Team
- Large regional ties are positive
- Strong relationship with the state library
- Advocacy at the local, state and federal levels
- Larger group can get better prices from vendors

Additional comments provided by respondents included:

- Excellent executive director
- As a community librarian in a county library system for the past 14 months, I have attended one event sponsored by the library cooperative. Otherwise I have received no communications from PLP or its predecessor.

Weaknesses

Table 4 shows the percent of respondents who agree or strongly agree with weaknesses identified during interviews. Additional comments offered by survey respondents are summarized following each element of the SWOT analysis.

Table 4: Weaknesses

Answer Options	% Responding Agree or Strongly Agree		
	ALL Respondents	Directors Only	Non-Directors Only
1. Economic conditions	97.3%	100.0%	97.7%
2. Basic services are unclear	78.8%	64.7%	82.8%
3. Uncertainty about “pay to play”	84.7%	70.6%	88.2%
4. Need to examine membership rates	89.7%	94.1%	89.3%
5. Geography makes it hard to speak with one voice	83.6%	82.4%	82.1%
6. Library directors, staff and boards may not feel a part of PLP	89.3%	88.2%	88.5%
7. No obligation to participate	79.4%	68.8%	79.7%
8. Purpose of PLP is unclear to those not actively involved	98.2%	100.0%	97.7%
9. Forging unexplored territory	60.4%	70.6%	55.7%
10. Some librarians don’t have a big vision	80.0%	88.2%	76.3%
11. Committees are struggling with no clear direction or purpose; no one is in charge	67.6%	70.6%	63.8%
12. Comfortable with existing committees and library systems	74.5%	64.7%	78.0%
13. Many jurisdictions with varying interests	89.2%	76.5%	90.6%
14. Resistance to change	73.8%	82.4%	71.6%
15. Larger size may result in loss of intimacy; connectedness	74.8%	88.2%	71.8%
16. Age of directors	38.0%	41.2%	36.8%
17. Communicating the purpose of PLP and how we make decisions	93.6%	94.1%	92.9%

A total of 113 people responded to questions about the weaknesses of the PLP. The weaknesses receiving the highest percent of overall respondents reporting they agree or strongly agree include:

- Purpose of PLP is unclear to those not actively involved
- Economic conditions
- Communicating the purpose of PLP and how we make decisions
- Need to examine membership rates
- Library directors, staff and boards may not feel a part of PLP

- Many jurisdictions with varying interests

In addition, 100% of directors responding agreed or strongly agreed with the following statements:

- Purpose of PLP is unclear to those not actively involved
- Economic conditions

Additional comments provided by respondents included:

- Funding is variable, which can cause stresses for those with fewer resources
- Need to define "Pay to Play"
- A few of these are a little awkward to answer. For example #11. Some committees may be struggling and that would be a weakness. But I am not sure that is an issue.
- Age of directors? I'm in my 20s and I find that offensive
- What is "pay to play"? For some of these statements more information is needed that is not found on the PLP website.
- I don't receive communications from or about PLP.
- Creates bigger bureaucracy and cuts down on local representation

Opportunities

Table 5 shows the percent of respondents who agree or strongly agree with opportunities identified during interviews. Additional comments offered by survey respondents are summarized following each element of the SWOT analysis.

Table 5: Opportunities

Answer Options	% Responding Agree or Strongly Agree		
	ALL Respondents	Directors Only	Non-Directors Only
1. Promote and support innovation	98.1%	100.0%	97.6%
2. Incubate ideas and communicate lessons learned	96.2%	100.0%	95.1%
3. Help shape the "Library of the future"	91.3%	94.1%	90.4%
4. Potential for larger grant funds if we speak with a common voice	91.3%	94.1%	90.2%
5. Patrons could access all libraries with one card	84.3%	76.5%	84.9%
6. Resource-sharing (database licensing, collections)	98.1%	100.0%	97.7%
7. Centralized purchasing	71.2%	76.5%	69.9%
8. Moving to open source as a group will be beneficial	80.6%	64.7%	84.2%
9. Research and development that benefits all	95.1%	88.2%	96.3%
10. Ability to help provide back office services	72.4%	64.7%	73.1%
11. Help staff develop new skills and competencies	94.2%	100.0%	92.6%
12. Regionalize continuing education	91.4%	88.2%	91.7%
13. Offer talent exchange to provide learning opportunities for aspiring managers	90.3%	88.2%	90.1%
14. Regional training for substitute librarians	65.0%	58.8%	64.6%
15. Use technology to bring people together virtually	90.6%	100.0%	88.2%
16. Take advantage of E-rate discount on federal telecommunication	76.5%	27.0%	76.9%
17. Lobby the state and federal government as a region	96.2%	100.0%	95.2%
18. Share staff that offer specialized skills or knowledge	94.2%	94.1%	93.8%
19. Share experiences, best practices, and lessons learned in broader forum	98.1%	100.0%	97.6%
20. Market what libraries are doing, especially in the digital	95.2%	94.1%	95.1%

environment			
21. Increase public awareness about the purpose and value of libraries	95.1%	94.1%	95.1%
22. Build on the Free2 marketing initiative on a regional basis	69.1%	76.4%	66.2%
23. Leverage the strengths of member libraries to share skills, programs and resources	95.2%	94.1%	95.1%
24. Create and leverage partnerships; develop a corporate partners program	89.0%	94.1%	87.2%
25. Strengthen connections and communication especially where we share patrons	97.1%	100.0%	96.3%

A total of 109 people responded to the questions about the opportunities of the PLP. The opportunities receiving the highest percent of overall respondents reporting they agree or strongly agree with the statement include:

- Resource-sharing (database licensing, collections)
- Promote and support innovation
- Share experiences, best practices, and lessons learned in broader forum
- Strengthen connections and communication especially where we share patrons
- Incubate ideas and communicate lessons learned
- Lobby the state and federal government as a region
- Market what libraries are doing, especially in the digital environment
- Leverage the strengths of member libraries to share skills, programs and resources
- Increase public awareness about the purpose and value of libraries
- Research and development that benefits all
- Help staff develop new skills and competencies
- Share staff that offer specialized skills or knowledge
- Regionalize continuing education
- Help shape the “Library of the future”
- Potential for larger grant funds if we speak with a common voice
- Use technology to bring people together virtually
- Offer talent exchange to provide learning opportunities for aspiring managers

In addition, 100% of directors responding agreed or strongly agreed with the follow statements:

- Resource-sharing (database licensing, collections)
- Promote and support innovation
- Share experiences, best practices, and lessons learned in broader forum
- Strengthen connections and communication especially where we share patrons
- Incubate ideas and communicate lessons learned
- Help staff develop new skills and competencies
- Lobby the state and federal government as a region
- Use technology to bring people together virtually

Additional comments provided by respondents included:

- We need to speak as a single entity more often.
- The problem with larger grants is they usually don't benefit the group, but rather a few loud voices.
- The assumption (#8) is that everyone has bought into the open source idea.
- Accessing all libraries with one card is great idea, however, even within BALIS that hasn't happened, so I don't see it happening within a larger partnership.

Threats

Table 6 shows the percent of respondents who agree or strongly agree with threats identified during interviews. Additional comments offered by survey respondents are summarized following each element of the SWOT analysis.

Table 6: Threats

Answer Options	% Responding Agree or Strongly Agree		
	ALL Respondents	Directors Only	Non-Directors Only
1. The economy won't improve	42.1%	50.0%	41.2%
2. Directors don't see the value in collegial work	22.8%	5.6%	27.5%
3. Apathy	57.7%	38.9%	62.7%
4. Some libraries want to be very localized	83.3%	88.9%	81.3%
5. Need to distinguish PLP from CALIFA, InfoPeople, and others	89.7%	100.0%	88.2%
6. Members need to understand the various services and how to access them	98.1%	94.4%	98.8%
7. People don't know what PLP is or what it can do	96.3%	94.4%	97.7%
8. Lack of time and energy dedicated to PLP	81.2%	66.7%	85.2%
9. Perception or reality that public libraries are subsidizing the academic libraries	28.3%	22.2%	30.8%
10. Funding of the PLP	90.3%	88.9%	90.3%
11. Funding model	86.3%	87.5%	85.5%
12. Participants need to see the benefit for them	100.0%	100.0%	100.0%
13. Conflicting priorities	94.0%	100.0%	92.5%

A total of 109 people responded to the questions about the threats facing the PLP. The threats receiving the highest percent of overall respondents agreeing or strongly agreeing with the statement include:

- Participants need to see the benefit for them (100%)
- Members need to understand the various services and how to access them
- People don't know what PLP is or what it can do
- Conflicting priorities
- Funding of the PLP
- Need to distinguish PLP from CALIFA, InfoPeople, and others

In addition, 100% of directors responding to the survey agreed or strongly agreed with the following statements:

- Participants need to see the benefit for them
- Conflicting priorities
- Need to distinguish PLP from CALIFA, InfoPeople, and others

Additional comments provided by respondents included:

- Management from the jurisdictions beyond the director level need to be better informed.
- Too far a distance to travel for meetings, continuing ed.; virtual meetings come at expense of interpersonal relationships built informally before, after and during meetings; interlibrary loan is already unwieldy for patrons without adding more challenges, losing local representation and interaction.

Environmental Scan

To understand the current environment facing libraries, respondents were asked to identify the degree of concern they have for challenges suggested during interviews. The results are shown in Tables 7 and 8.

Table 7: Summary of Responses About Today's Challenges

Answer Options	Major Concern	Minor Concern	Not a Concern	Response Count
1. Funding/budgets	99	5	2	106
2. Declining revenues	91	12	2	105
3. Increasing demand for services	72	30	4	106
4. Physically failing facilities	45	36	26	107
5. Demand for technology (upgrading to fiber, outlets, wireless connections, terminals)	68	30	9	107
6. Demand for more hours, access, 24/7 operating environment	46	50	11	107
7. Retirements/turnover	30	53	24	107
8. Moving toward self-service models	23	52	31	106
9. Social networking	21	57	28	106
10. Staying current and relevant	63	38	5	106
11. Meeting the changing knowledge, skills and abilities needed by library staff (staff development)	54	49	4	107
12. Electronic resources	46	54	6	106
13. Meeting changing service demands (internet; community center/meeting place model)	58	38	8	104
14. Staffing patterns	62	36	7	105
15. Keeping libraries strong	75	27	3	105

Table 8: Percent of Respondents Rating Today's Challenges as a Major Concern

Answer Options	% Rating this a Major Concern
1. Funding/budgets	93.4%
2. Declining revenues	86.7%
3. Increasing demand for services	67.9%
4. Physically failing facilities	42.1%
5. Demand for technology (upgrading to fiber, outlets, wireless connections, terminals)	63.6%
6. Demand for more hours, access, 24/7 operating environment	43.0%
7. Retirements/turnover	28.0%
8. Moving toward self-service models	21.7%
9. Social networking	19.8%
10. Staying current and relevant	59.4%
11. Meeting the changing knowledge, skills and abilities needed by library staff (staff development)	50.5%
12. Electronic resources	43.4%
13. Meeting changing service demands (internet; community center/meeting place model)	55.8%
14. Staffing patterns	59.0%
15. Keeping libraries strong	71.4%

The challenges reported to be of greatest concern **today** include:

1. Funding/budgets (93.4% report major concern)
2. Declining revenues (86.7% report major concern)
3. Keeping libraries strong (71.4% report major concern)

Respondents were asked about challenges they anticipate in **five years**. Results are shown in Tables 9 and 10 below.

Table 9: Challenges Anticipated in Five Years

Answer Options	Major Concern	Minor Concern	Not a Concern	Response Count
1. Funding/budgets	83	21	1	105
2. Declining revenues	73	29	2	104
3. Increasing demand for services	65	33	7	105
4. Physically failing facilities	41	40	25	106
5. Demand for technology (upgrading to fiber, outlets, wireless connections, terminals)	65	35	5	105
6. Demand for more hours, access, 24/7 operating environment	47	51	8	106
7. Retirements/turnover	29	57	20	106
8. Moving toward self-service models	15	59	31	105
9. Social networking	19	55	31	105
10. Staying current and relevant	67	34	4	105
11. Meeting the changing knowledge, skills and abilities needed by library staff (staff development)	56	47	3	106
12. Electronic resources	51	48	5	104
13. Meeting changing service demands (internet; community center/meeting place model)	55	42	6	103
14. Staffing patterns	57	42	5	104
15. Keeping libraries strong	77	23	4	104

Table 10: Percent Rating Challenges Five Years from Now as a Major Concern

Answer Options	% Rating this a Major Concern
1. Funding/budgets	79.0%
2. Declining revenues	70.2%
3. Increasing demand for services	61.9%
4. Physically failing facilities	38.7%
5. Demand for technology (upgrading to fiber, outlets, wireless connections, terminals)	61.9%
6. Demand for more hours, access, 24/7 operating environment	44.3%
7. Retirements/turnover	27.4%
8. Moving toward self-service models	14.3%
9. Social networking	18.1%
10. Staying current and relevant	63.8%
11. Meeting the changing knowledge, skills and abilities needed by library staff (staff development)	52.8%
12. Electronic resources	49.0%
13. Meeting changing service demands (internet; community center/meeting place model)	53.4%
14. Staffing patterns	54.8%
15. Keeping libraries strong	74.0%

The challenges anticipated to be of greatest concern **in five years** include:

1. Funding/budgets (79.0% report major concern)
2. Keeping libraries strong (74.0% report major concern)
3. Declining revenues (70.2% report major concern)

Your Thoughts and Ideas

ACTIVITY: What themes stand out from the survey?

ACTIVITY: What goals do you think should be considered to allow PLP to Meet the Challenge in the future? Please list at least three (or more) possible goals.

WE LOOK FORWARD TO HEARING YOUR IDEAS ON FEBRUARY 8!

If you have any questions, please call Nancy Hetrick at 408 437-5400

or Amy Paul at 513 309-3709 of Management Partners.

Attachment B – February 8 Workshop Agenda and Meeting Summary

PLP: Meeting the Challenge Workshop February 8, 2010

Location: San Jose Public Library Dr. Martin Luther King Jr.
150 E. San Fernando Street, San Jose
King Library Boardroom

Workshop Facilitators: Amy Paul and Nancy Hetrick from Management Partners

1. Introduction from Jane Light, PLP President
2. Discuss Vision and Mission (in small groups)
3. Identify Values
4. Review Themes and Survey Data
5. Discuss Potential Goals based on Themes that Emerged from the Survey Data
6. Share Potential Goals with Entire Group
7. Combine/Refine/Goal List
8. Discuss Next Steps
9. Adjourn

Pacific Library Partnership Meeting the Challenge Workshop Summary (February 8)

On February 8, 2010, library directors from 19 libraries came together to participate in the PLP's strategic planning effort entitled PLP: Meeting the Challenge.

Nancy Hetrick and Amy Paul of Management Partners worked with the Project Team to plan the session. They developed a participant briefing book that was sent to directors in advance of the meeting so that the time together would be optimized. Participants came prepared to discuss ideas about a vision, mission, values and potential goals.

A summary of the ideas resulting from the session follows.

VISION

Establishing a *vision* of where the organization wants to be in the future is a fundamental part of the strategic planning process. A vision is a statement of where the organization wants to be in the future. Workshop participants came up with the following phrases, words and ideas for a PLP Vision Statement.

Visioning *Phrases and Words* Identified by Participants

- Be the big picture partner for collaboration serving our communities
- Synergy
- Bringing libraries together to
- Highest quality, most innovative and response library service
- Partnerships
- Immediately responsive to societal change
- Excellence
- Expertise
- Demonstrates strategic planning and thinking into the future
- Nationally known
- Proud, shameless self-promotion
- Innovation through collaboration
- Vibrant
- Resources and staff development
- Value

Suggested Vision Statements

1. PLP anticipates, innovates, communicates and collaborates to ... (Group Suggestion)
2. PLP is the catalyst for Bay Area libraries to continuously anticipate and respond together to opportunities and changing community needs. (Individual Suggestion)
3. Together libraries serve communities better (Individual Suggestion)
4. Strengthening libraries strategically through innovation and collaboration (Individual Suggestion)
5. Building strong libraries through innovation and collaboration (Individual Suggestion)

6. PLP maximizes its members' ability to enrich their community (Individual Suggestion)
7. To be the leader in library service innovation and delivery (Individual Suggestion)
8. Bringing opportunities and libraries together (Individual Suggestion)
9. *Management Partners Suggestion:* PLP is the leader in library service innovation and collaboration in the Bay Area

MISSION

A Mission Statement defines what the organization stands for and what it will do. The Mission Statement communicates why the organization exists. Workshop participants came up with the following phrases, words and ideas for a PLP Mission Statement.

Mission *Phrases and Words* Identified by Participants

- Efficient
- Effective
- Nimble responses
- Regional
- Encourage/ provide innovate services
- Leveraging resources and opportunities
- Technology
- Collaboration
- Partnerships
- Strategic
- Regional
- Efficiencies/value
- I give resources I get back
- PLP cost effective for members

Suggested Mission Statements

1. Building a collaborative library community by providing opportunities for innovative services by leveraging resources (Group Suggestion)
2. PLP strategically responds to changing conditions by setting the stage for innovation and leveraging member resources (Group Suggestion)
3. Bringing opportunities and libraries together (Individual Suggestion)
4. PLP strengthens communities by leveraging member resources to provide innovative services (Individual Suggestion)
5. *Management Partners Suggestion:* PLP is a catalyst for bringing libraries together by leveraging resources, promoting research, and developing programs and services to efficiently and effectively serve its members. The PLP exemplifies that the whole is greater than the sum of its parts.

VALUES

Values describe what the organization stands for and what its members believe in. Participants ranked the following values through a dot-voting process. Through group discussion, the values of forward-thinking and risk-taking were added.

*Effectiveness (15)	Teamwork (4)	Transparency (1)
*Collaboration (14)	*Diversity (3+ discussion)	Feedback (0)
*Return on investment (13)	Mindful of differences (2)	Assessment (0)
*Responsiveness (12)	Trust (2)	Free libraries (0)
*Efficiency (8)	Unified voice (2)	Our libraries come first (0)
Patron-centric (8)	Collegiality (1)	*Forward-thinking (Added)
Sharing (5)	Commitment (1)	*Risk-taking (Added)
Support (5)	Equity (1)	
Accountability (4)	Respect (1)	

* Indicates consensus on PLP values and numbers in () indicate original number of votes. Diversity, Forward-thinking and Risk-taking were added to the top vote-getters through group discussion.

PLP Values:

Effectiveness

- Make a difference
- Measurable
- Quantifiable
- Retains members
- Expectations are clear and are met
- All levels of organization understand the PLP

Collaboration

- Working together
- Letting go of control
- Sharing
- Level playing field
- Consensus

Return on Investment

- Cost-effectiveness
- Perceived value
- You want to join because of what you will get back
- Community benefit
- Cheap and peppy
- Savings as a result of membership in PLP

Responsiveness (to the needs of members)

- Timely
- Quick
- Agile
- What's in it for me? – Member needs
- Helping solve problems

Efficiency

- Leveraging resources
- Together is better
- Cost-effective
- Using fewer resources to get things done

Diversity

- Honoring diverse ideas
- Respecting diversity of libraries and communities

Forward Thinking and Risk-Taking

- Experimenting for the benefit of all
- Anticipating changing needs and future needs of members
- Creates opportunities – is proactive
- Takes risks

THEMES AND OPPORTUNITIES

Participants in two small groups were asked to review the results of the advance online survey and identify themes and opportunities. The combined results of the two groups are listed below.

Themes

- Some survey respondents didn't know enough about PLP
- Need for understanding and knowledge of PLP
- Lots of confusion
 - Why did we change?
 - What's in it for us?
 - Did some organizations go away?
 - How is it different from CALIFA, InfoPeople, local consortia?
- Funding questions and concern about budget
- What are the priorities of PLP?
- Value of sharing
- PLP idea was seen as positive
- How will PLP function? How will it work?
- Local control is very important to staff (what might I lose?)
- How much time is PLP going to take?
- Where does PLP fit in broad priorities?
- Disconnect about apathy between Board and staff
- Need for promoting and marketing what we do
- Agreement about strengths of PLP, but not as much agreement in other areas
- Is this going to take the place of the local consortium?
- What do we get for what we pay for PLP?

- Transparency
- Keeping libraries strong and relevant
- Disagreement about whether the size of PLP is a positive or a negative
- Products sell the concept
- Silos/we're unique/perception that we have different needs
- Systems have been successful with innovation, grants, and relationships (State library)
- Networking is valued, especially the personal connection
- Research and development/innovation
- Skills development and continuing education
- Communication
- Discomfort with not knowing what PLP is or means

Opportunities

- Articulate the return on investment of the PLP and give members talking points
- Articulate what is lost if a member stops being a member
- Transparency—show data
- Define what PLP is and communicate to stakeholders, including relationships and differences between existing consortia and PLP
- Identify ways that members can share PLP resources (including capacity building)
- Demonstrate value
- Develop communication platform (e.g., annual report for PLP)
- Define PLP products and services
- Ability to work with other organizations and groups at the regional, state, federal and level (advocacy)
- Greater visibility
- Collaborate through use of IT
- Public awareness
- Continuing education with staff
- Help shape future of state library
- Consolidate back-of-the-house functions
- Building “big” partnerships (corporate, foundations, etc.)
- Develop or hire and provide expertise (shared resource)
- Play “hard ball” politics
- Be serious about advocacy
- Develop a single voice for regional libraries

DRAFT GOALS

Review of the themes and opportunities identified by the small groups resulted in the identification of five categories. They include the following:

- Organization
- Shared Resources
- Innovation
- PR and Marketing
- Advocacy

Participants worked together to draft goals for each of these areas. The results are listed below:

Organization

DRAFT Goals:

1. Clearly define roles, responsibilities, and benefits of the PLP and communicate them to members and stakeholders
2. Develop a fair and sustainable funding structure

Potential Strategies

- Develop and implement a comprehensive communication plan

Shared Resources

DRAFT Goals:

1. Develop a comprehensive plan to formalize the shared resources that are valued by members
2. Ensure that expertise, skills and knowledge are available throughout the region.

Potential Strategies

- Identify what resources are available
- Identify needs/gaps and what has broad appeal
- Share expertise (e.g., social media)
- Develop communities of interest to share best practices and promote staff development

Innovation

DRAFT Goals:

1. Enhance PLP member services by developing innovative approaches to service delivery
2. Create a culture that inspires and supports entrepreneurship and innovation

PR and Marketing

DRAFT Goal:

1. PLP helps to promote and market library services

Potential Strategies

- Provide PIO services on an hourly or annual basis
- Provide training in promotion and marketing to library staffs
- Partner with Chambers of Commerce and Convention and Visitors Bureaus to promote libraries
- Develop multi-system campaigns such as Free To.....

Advocacy

DRAFT Goal:

1. Effectively advocate for libraries on a state and regional level on behalf of the PLP and its members.

Potential Strategies

- Represent PLP to State Library
- Establish legislative priorities for the region
- Identify other organizations that PLP could link with to advocate about common interests (connect organizations such as CALIFA, League of California Cities, CSAC, etc.)
- Provide policy analysis, communicate how issues affect our region
- Speak with one voice (PLP says, “Here is our position on X.”)
- Provide crisis management support to members

Attachment C – March 1 Workshop Agenda and Meeting Summary

PLP: Meeting the Challenge Workshop March 1, 2010

Location: San Jose Public Library Dr. Martin Luther King Jr.
150 E. San Fernando Street, San Jose
King Library Boardroom

Workshop Facilitators: Amy Paul and Nancy Hetrick from Management Partners

1. Welcome by Jane Light, PLP President
2. Review Draft Vision and Mission Statements
Reach Consensus on Key Elements
3. Review and Validate Goals
4. Develop Success Factors and Strategies for Each Goal
5. Share Strategies with Entire Group and Identify Priorities
6. Wrap Up and Next Steps
7. Adjourn

Pacific Library Partnership Meeting the Challenge March 1, 2010 Workshop Summary

On March 1, 2010, library directors from 11 libraries came together to participate in the second of two planning workshops for the strategic planning effort entitled PLP: Meeting the Challenge.

Nancy Hetrick and Amy Paul of Management Partners worked with the Meeting the Challenge Project Team to plan for the session. They compiled the results from the first workshop (held on February 8), and reviewed it with the Project Team. The workshop summary was distributed to the directors in advance of the March 1 meeting along with a request for advance work to be completed so that the time together would be optimized. Participants came prepared to reach consensus about vision and mission statements for the PLP, validate potential goals identified during the first session, and discuss strategies and success factors for the goals.

A summary of the results from the session follows.

PLP Vision Statement

Strengthening libraries strategically through innovation and collaboration.

PLP Mission Statement

PLP builds a collaborative library community by leveraging resources, promoting research, and developing programs and services to effectively and efficiently serve its members.

PLP Goals and Strategies

Organization

Goal A: Become a nimble and sustainable organization.

Strategies

1. Define roles, responsibilities and the benefits of PLP
 - a. Engage groups to provide input on the transition plan and expectations
 - b. Create a handbook that outlines PLP guidelines, structure, expectations, and resources

2. Prepare a transition plan
3. Develop a fair and sustainable funding structure
 - a. Present a plan to members by Dec 2010
4. Develop and implement a comprehensive communication plan
 - a. Communicate roles, responsibilities and benefits to members and stakeholders
5. Leverage the use of technology
 - a. Stream the May annual meeting online for greater access

What does success look like?

- There is greater participation and access across the region and organizational levels through use of technology
- There is understanding and knowledge about PLP throughout the region
- Members utilize new tools and opportunities available through PLP
- Staff at all levels are empowered to contribute to the PLP vision

Shared Resources

Goal B: Share resources and expertise.

Strategies

1. Conduct an assessment of what currently exists (and is potentially shareable)
 - a. Develop an implementation plan for using resources
 - b. Create a database/exchange
 - c. Share materials (interlibrary loans/document delivery systems/universal borrowers card)
 - d. Develop a plan to acquire or create resources that are valued
2. Identify new resources that have potential for scaling to PLP
 - e. Analyze value/costs/usage
 - f. Create a database/exchange to offer/solicit resources and expertise (including grant writers)
 - g. Develop a plan to acquire or create resources that are valued
3. Create communities of interest to share best practices
 - h. Interaction methods should include virtual communities, face-to-face interactions, annual meetings
4. Foster skill development and mentoring
 - a. Create exchange program
 - b. Identify existing resources and leverage them
 - c. Create a database

What does success look like?

Strategy 1

- Survey of PLP members is completed
- Shareable resources are identified (including systems to access and deliver resources)
- Priorities are identified
- Implementation plan (menu of services) is complete

Strategy 2

- Environmental scan is complete
- Feasibility and scalability of societal innovations and trends are analyzed
- Menu of services is created
- Pilot project(s) is completed (Identify a quick win)

Strategy 3

- A plan for communities of interest is established
- Lessons learned have been analyzed and communicated
- Knowledge base has been created

Strategy 4

- An exchange program is available to PLP members (partner with MTEP or other organizations... library to library and/or other departments)
- Expertise database has been created and evaluated
- Shared services pricing menu for human resources and other resources has been developed

Innovation

Goal C: Create opportunities to develop and provide entrepreneurial and innovative services.

Strategies

1. Fund an innovations grant program
2. Fund a loan program
3. Form a PLP think tank as a resource to identify and respond to emerging trends and issues
 - a. Conduct an environmental scan
 - b. Apply the results of the environmental scan
 - c. Create communities of interest around innovation
4. Apply entrepreneurial strategies for revenue
5. Identify partnerships with local government, universities and business

What does success look like?

Strategy 1

- A sustainable model is developed

Strategy 2

- A sustainable loan program model is developed

Strategy 3

- A plan for communities of interest is established
- Lessons learned have been analyzed and communicated
- Knowledge base has been created

Strategy 4

- At least one revenue generating service is implemented

Strategy 5

- At least one partnership is created

Strategy 6

- Think tank structure is identified and members are appointed

Communication

Goal D: Promote and market library services.

Strategies

1. Internal
 - a. Identify audiences
 - b. Implement an internal communication plan
 - c. Send out annual report
 - d. Model new technology
2. External
 - a. Respond to new methods of communication (stay current about how people are communicating)
 - b. Provide PIO services on an hourly or annual basis
3. Conduct a needs assessment
4. Provide training on promotion and marketing to library staffs
5. Partner with chambers of commerce and convention, visitors bureaus, and professional associations (League of CA Cities, CSAC, CPRS, IT Directors, etc.) to promote libraries
6. Develop multi-system campaigns such as Free To.....
 - c. Leverage common media market

What does success look like?

Internal

- Staff of member libraries and key stakeholders know what the PLP is and the value it provides
- PLP has a logo or other identifier that represents the partnership

External

- Members use the tools and resources available for promoting and marketing libraries

Advocacy

Goal E: Advocate for libraries on a state and regional level on behalf of PLP members.

Strategies

1. Represent PLP to State Library
2. Provide crisis management support to members
3. Be a clearinghouse for information and resources
 - a. Apply the Alliance for Innovation online model for sharing information to the library environment (www.transformgov.org).
4. Provide representatives to legislative committees (CLA; ALA)

5. Identify other organizations that PLP could link with to advocate about common interests (connect organizations such as CALIFA, League of California Cities, CSAC, etc.)

What does success look like?

- When there is a crisis, members call the PLP
- Grant money is pursued and received
- State library looks to PLP as a resource and example
- Members are submitting information to the PLP for posting and dissemination

Attachment D – Strategic Planning Workshop Participant List

Name	Library	Feb 8	Mar 1	System
Melinda Cervantes	Santa Clara County Library	Yes	No	SVLS
Cathy Sanford	Contra Costa County	Yes	Yes	BALIS
Valerie Sommer	South San Francisco Public Library	Yes	No	PLS
Ginny Steel	University of California Santa Cruz	Yes	No	MOBAC
Jane Light	San Jose Public Library	Yes	Yes	SVLS
Susan Gallinger	Livermore Public Library	Yes	No	BALIS
Monique A. le Conge	Richmond Public Library	Yes	Yes	BALIS
Eleanor Uhlinger	Naval Postgraduate School	Yes	Yes	MOBAC
Carol Simmons	Daly City Library	Yes	No	PLS
Linda Dydo	Los Gatos Public	Yes	No	SVLS
Karen Burnett	Mountain View Public Library	Yes	Yes	SVLS
Derek Wolfram	Santa Clara County Library	Yes	Yes	SVLS
Lisa G Rosenblum	Sunnyvale Public Library	Yes	Yes	SVLS
Carmen Martinez	Oakland Public Library	Yes	No	BALIS
Jane Chisaki	Alameda Free Library	Yes	No	BALIS
Donna Corbeil	Berkeley Public Library	Yes	Yes	BALIS
Julie Passalacqua	Santa Clara City Library	Yes	Yes	SVLS
Jean Hofacket	Alameda County Library	Yes	No	BALIS
Kim Bui-Burton	Monterey Public Library	Yes	Yes	MOBAC
John Alita	San Bruno Public Library	Yes	Yes	PLS
Linda Crowe	PLP Executive Director	Yes	Yes	
Terry Jackson	PLP staff	Yes	Yes	
Wendy Cao	PLP staff	Yes	Yes	
Donna Truong	PLP staff	Yes	Yes	