



San Mateo County Library  
Connect. Discover. Evolve.

# San Mateo County Library Strategic Plan: 2007 to 2014

*Framework for a Successful Future*



September 2007

## ACKNOWLEDGEMENTS

### JOINT POWERS AUTHORITY BOARD MEMBERS

Charles Marsala, Atherton  
Dave Warden, Belmont  
Cyril Bologoff, Brisbane  
Donna Rutherford, East Palo Alto  
Pam Frisella, Foster City  
Marina Fraser, Half Moon Bay

Nadia Holoher, Millbrae  
Jim Vreeland, Pacifica  
Maryann Derwin, Portola Valley  
Thomas Davids, San Carlos  
Carroll Ann Hodges, Woodside  
Jerry Hill, San Mateo County

### OPERATIONS COMMITTEE MEMBERS

Wende Protzman, Atherton  
Jack Crist, Belmont  
Clay Holstine, Brisbane  
Alvin James, East Palo Alto  
James C. Hardy, Foster City  
Marcia Raines, Half Moon Bay

Ralph Jaeck, Millbrae  
Stephen Rhodes, Pacifica  
Angela Howard, Portola Valley  
Mark Weiss, San Carlos  
Susan George, Woodside  
Peggy Jensen, San Mateo County

### DIRECTOR OF LIBRARY SERVICES

Victoria L. Johnson

### ASSISTANT DIRECTOR OF LIBRARY SERVICES

Anne-Marie Despain

### STRATEGIC PLANNING COMMITTEE

Thom Ball, Pacifica Libraries Branch Manager  
Pam Deal (Chair), Financial Services Manager  
Sarah Houghton-Jan, Information and Web Services Manager  
Anne Marie Malley, Half Moon Bay Branch Manager  
Ned Richards, Collections and Cataloging Services Manager

### STRATEGIC PLANNING CONSULTANT

Harry Christiansen, Organizational Change Consulting Group

## DIRECTOR'S INTRODUCTION



Victoria L. Johnson  
Director of Library Services

What an exciting time it is for public libraries! The rapid evolution of library services has been significantly influenced by the advent of new technologies, from self-service equipment to social networking tools and opportunities. Changing demographics and patron expectations for fast, easy, and convenient high quality service also provide momentum. In recognition of the fact that this change process will continue, the San Mateo County Library (SMCL) set out to develop a high-level, long range plan to guide the development and continuous improvement of library services.

Our process was designed to assist development of a seven-year plan that identifies the important areas of focus, but recognizes that we cannot imagine the future in enough specificity to be prescriptive. Instead, we sought a plan with clearly stated guiding principles more appropriate to the dynamic environment in which we operate. At the same time we needed a plan that will help us identify the most important elements to focus on and a strategic document that is clear and accessible to all staff giving them a sense of purpose and direction.

The basis for plan development rests on how we want San Mateo County Library to be perceived at the end of the period:

- a model of customer service - customers get what they want, when and where they want it
- an example of fiscal health - both effective and efficient in the way we operate
- a trained and motivated staff - eager to learn, fulfilled by their work and energized in their careers
- a world class library - ahead of the curve, relevant, envied

The plan presented in this document is the tool to help us accomplish this. By 2014 we expect our member agencies and their constituents to point with pride to their libraries; recognizing those characteristics which make each one unique and valuing the similarities among them that insure every resident will receive excellent, equitable service. Further we aim to have civic organizations within the areas served feel that SMCL is a good community partner, complementing their work to build strong and vital communities. In turn, we desire to have civic partners who advocate for strong libraries and free access to information as a required ingredient of quality of life and an essential element of a free society. All this can only be accomplished with a fully engaged staff that operates as partners with the library administration, their fellow employees throughout SMCL and their communities. Each of us must pride ourselves on being stewards of the organization and this plan in order to achieve our goals and the ultimate success of the strategic plan.

## EXECUTIVE SUMMARY

An inclusive approach was used to develop the strategic plan using input from a broad cross section of library staff and library patrons. This was accomplished first by a survey of 212 internal and 1,315 external stakeholders, and second by a two-day collaborative planning conference attended by 38 stakeholders representing the library's patrons, staff, governing board, foundations, and collaborating partners. The survey results were then incorporated during the planning conference, to help shape development of the San Mateo County Library Strategic Plan. This plan, alongside other indicators on the performance of the organization, will serve as a framework for library branches and divisions to develop action plans that are aligned with, and in support of, the strategic plan.

## PROFILE AND HISTORY OF THE SAN MATEO COUNTY LIBRARY

The San Mateo County Library is a Joint Powers Authority (JPA) and comprised of the cities of Atherton, Belmont, Brisbane, East Palo Alto, Foster City, Half Moon Bay, Millbrae, Pacifica, Portola Valley, San Carlos, Woodside, and the unincorporated areas of the county.

The County Library JPA is governed by a Board consisting of representatives from each member entity. Oversight responsibility, the ability to conduct independent financial affairs, approve budgets, sign contracts, and otherwise influence operations and account for fiscal matters is exercised by the San Mateo County Library Governing Board.

Property taxes pay for more than 90% of the cost to operate the County Library. Designated as a special district, the County Library is entitled to receive a small portion of the property tax paid by all property owners in the 11 member cities and the unincorporated area. Other sources of funding include private, state and federal grants, interest earnings, fines and fees, and generous gifts from individuals and the Friends of the Library. Additionally, some member cities choose to enhance local service by providing supplemental funding to support extended hours of service.

The San Mateo County Library offers an array of library services. The 12 branches are a source of books, periodicals, newspapers and information in multiple languages. The libraries provide access to computers and the Internet, music, videos, business resources, and educational research. Online databases also serve as an additional resource for library users. The County Library website ([smcl.org](http://smcl.org)) provides access to a wealth of information and is accessible in each branch library or from residents' personal computers at home, work, or school.

The San Mateo County Library also responds to the informational, educational and entertainment needs of library users by offering a broad range of programs to children and adults including author readings, lectures, films, exhibits, dance and musical performances. Other outreach services include volunteer tutoring, homework help centers, and computer training.

## SAN MATEO COUNTY LIBRARY VISION AND MISSION

### VISION

San Mateo County Library  
Connect. Discover. Evolve.

### MISSION

The San Mateo County Library provides innovative, dynamic services that connect our diverse community with opportunities for individual growth and enrichment.

## SAN MATEO COUNTY LIBRARY STRATEGIC GOALS

### DESTINATION LIBRARIES

Create welcoming spaces that promote a sense of community pride and facilitate customer-centered services.

### COLLECTIONS AND SERVICES

Develop and deliver outstanding library collections and services that reflect the interests and needs of our diverse customer base.


### COMMUNITY ENGAGEMENT


Raise awareness and visibility of SMCL services and increase recognition of the library as an essential community asset.



### ORGANIZATIONAL CULTURE

Become a learning organization that continuously assesses community needs and develops staff to provide excellent customer service.

## STRATEGIC GOALS AND OBJECTIVES

	<p><b>Challenge:</b> SMCL customers expect welcoming and functional libraries that are easy to use, reflect the character of the local community, and maximize the modern library experience.</p>
<b>DESTINATION LIBRARIES</b>	<p><b>Goal 1:</b> Create welcoming spaces that promote a sense of community pride and facilitate customer-centered services.</p> <p style="text-align: center;"><b>Objectives</b></p> <p>1.1 Offer physical and virtual spaces that serve as gathering places where our diverse communities connect and share.</p> <p>1.2 Create and refresh intuitive library spaces that support diverse community and staff needs.</p> <p>1.3 Provide a robust technology infrastructure to support a wide array of state-of-the-art services.</p> <p>1.4 Actively support community efforts to enhance library services and facilities.</p>

	<p><b>Challenge:</b> SMCL customers expect high-quality collections and services that meet the needs of our diverse communities and enhance quality of life.</p>
<b>COLLECTIONS AND SERVICES</b>	<p><b>Goal 2:</b> Develop and deliver outstanding library collections and services that reflect the interests and needs of our diverse customer base.</p> <p style="text-align: center;"><b>Objectives</b></p> <p>2.1 Anticipate and meet the informational, educational, cultural, and recreational needs of our diverse communities with up-to-date, dynamic collections.</p> <p>2.2 Market and promote collections in a variety of formats through easy-to-use discovery systems.</p> <p>2.3 Provide exceptional services that build and support a literate community.</p> <p>2.4 Provide our community with the knowledge and tools needed to succeed in an information society.</p> <p>2.5 Offer an intuitive virtual presence that facilitates access to a full range of physical and digital services.</p> <p>2.6 Expand and strengthen programs and events that enrich, educate, and entertain.</p>

	<p><b>Challenge:</b> SMCL needs to build greater awareness about the range of services offered and the opportunities for collaboration.</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">COMMUNITY ENGAGEMENT</p>	<p><b>Goal 3:</b> Raise awareness and visibility of SMCL services and increase recognition of the library as an essential community asset.</p>
	<p style="text-align: center;"><b>Objectives</b></p> <p>3.1 Engage the community in the library experience and maximize awareness of the variety and the value of library services.</p> <p>3.2 Connect with and attract potential library users through innovative methods.</p> <p>3.3 Expand and strengthen strategic working relationships and assume a prominent role in our communities.</p>
	<p><b>Challenge:</b> SMCL will reflect and engage the community in order to anticipate and align with customer expectations.</p>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">ORGANIZATIONAL CULTURE</p>	<p><b>Goal 4:</b> Become a learning organization that continuously assesses community needs and develops staff to provide excellent customer service.</p>
	<p style="text-align: center;"><b>Objectives</b></p> <p>4.1 Assess and allocate resources to be a world-class library.</p> <p>4.2 Attract, hire, and retain optimum levels of a dynamic and diverse staff that provide the best possible customer service.</p> <p>4.3 Cultivate an environment that encourages participation, open communication among all, and recognizes team and individual contributions.</p> <p>4.4. Establish an environment that promotes leadership and stewardship to ensure the long-term health of SMCL.</p>

## SURVEY METHODOLOGY AND RESULTS

### BACKGROUND

In June 2007, the San Mateo County Library conducted a survey of internal and external stakeholders in order to assess what library users value; and the types of services and improvements the County Library might consider implementing to meet the demands of its customers into the future. The survey results represent an important source of information used to assist in the development of the new Strategic Plan. The complete survey report is available at [www.smcl.org/strategicplansurvey.html](http://www.smcl.org/strategicplansurvey.html).

### SURVEY METHODOLOGY

In order to obtain input from all key stakeholders, including library users, staff, partners, and decision-makers, two surveys were developed. The external stakeholder survey was created to target library users. The internal stakeholder survey was created to target library staff, Friends of the Library and Foundation members, and Joint Powers Authority Governing Board and Operations Committee members. The surveys were posted on-line at [smcl.org](http://smcl.org) and also made available in hard copy form at each of the 12 branches. The survey was left open for 10 days.

The response rate was considered to be extremely good. Twenty-two questions were asked in the external stakeholder survey, and a total of 1,315 surveys were completed. Eighteen questions were asked in the internal stakeholder survey, and a total of 212 surveys were completed. Results are presented for all topics. In some cases respondents opted to skip over questions; therefore, the total number of responses is included following the title of each question. Scores are presented as whole numbers for ease of reading. This may, on occasion, result in percentages not totaling exactly 100%. Below is a summary of key findings.

### KEY FINDINGS

#### What External Stakeholders Value

- Materials most frequently checked out from the library include audio/video, fiction, and non-fiction materials in nearly equal numbers
- Respondents most frequently visit the adult areas of the library followed by computer areas, and children's areas
- Respondents indicated they typically visit the library to check out materials, followed by picking up holds, and using library computers
- Respondents identified posters and other public relations materials as the way they learn about library events and services
- Respondents expect a large variety of technologies (software, hardware, and online services) from the library, particularly online services like downloadable materials and online programs and classes

### External Stakeholders Ideas for Service Improvements

- The most frequently identified improvements that would increase library usage included longer hours, followed by more materials, cafes, and additional events
- While most respondents indicated they had enough time on library computers, when asked how much additional time was needed, the majority said at least 30 minutes
- Respondents indicated less satisfaction with the selection of books, music, and videos available in languages other than English
- Respondents were generally unaware that the County Library offers online homework help

### What Internal Stakeholders Value

- Customer service was identified as the most important service provided by the County Library
- The opportunity to work with highly skilled and motivated staff, and the rewards that comes from working with the public were frequently cited as areas of satisfaction

### Internal Stakeholders Ideas for Service Improvements

- A focus on providing optimal customer service, examining programs offered to ensure alignment with community needs, and making best use of building and equipment configurations and resources were frequently identified as areas needing improvement
- Respondents suggested that services to remote and homebound users be expanded, and enhancements to web and online services continue
- Inadequate staffing to meet service needs, and poor communication within the organization were frequently cited as areas of concerns
- Respondents indicated a need to improve the materials, programs and services provided to ethnic populations
- The majority of respondents cited the following as other feedback to consider; the need to examine ways to improve upon the diverse needs of each community through the right balance of materials and services; and examine ways to improve the distribution of staff resources and workloads

## STAKEHOLDERS CONTRIBUTING TO THE STRATEGIC PLAN

### BACKGROUND

In July 2007, 38 stakeholders representing the library's patrons, staff, governing board, foundations, and collaborating partners contributed to a two-day collaborative strategic planning conference at the San Carlos Branch Library.

### PLANNING PROCESS

On the first day, stakeholders began by acknowledging the past history of the San Mateo County Library and by analyzing results from the internal and external surveys. Next, the stakeholders prioritized the external trends and forces affecting the library system and subsequently conducted a series of conversations to develop a shared understanding of the library system's current operational environment and key organization issues. The first day concluded with stakeholders recommending improvements to the mission statement. After the first day concluded, a small group of stakeholders (mission team) revised the mission statement based on the recommendations of the stakeholders.



The second day began with the mission team presenting the revised mission statement for review by all stakeholders. Next, the stakeholders identified the key focus areas in which the San Mateo County Library wanted to succeed over the next 5 to 7 years (2007 to 2014). The stakeholders then self-selected the focus area in which they were interested. Each focus area group then drafted the goals and objectives for

their focus area and presented their recommendations to all of the stakeholders. The second day concluded with stakeholders recommending improvements to the vision statement. After the second day concluded, a small group of stakeholders (vision team) revised the vision statement based on the recommendations of the stakeholders.



## CONFERENCE STAKEHOLDERS

### Library Users

Melissa Moss  
Melissa Simpson  
Diane Smelker  
Donna Spillane  
Anthony Vassallo

### Collaborating Partners

Deb Allum  
Angel Barrios  
Linda Crowe  
Trish Hudson  
Ed Kaufman  
Judith Selvidge  
Dwight Wilson

### Governance

Pam Frisella  
Angela Howard

### Library Staff

Jeanine Asche  
Thom Ball  
Kathleen Beasley  
Greg Bodin  
Mary Castle  
Cathy Cheek  
Ida daRoza  
Pam Deal  
Anne-Marie Despain  
Heidi Dolamore  
JC Escalante  
Darwin Eustaquio  
Daniel Hackett  
Sarah Houghton-Jan  
Vickey Johnson  
Reeba Lynn  
Anne Marie Malley  
Orest Mytrofaniuk  
Alex Perez  
Gina Rankin  
Ned Richards  
Cynthia Rider  
Ruth Stout  
Paula Teixeira



For Additional Information Contact:

San Mateo County Library  
125 Lessingia Court  
San Mateo, CA 94402-4000  
650.312.5258  
[www.smcl.org](http://www.smcl.org)

This Strategic Plan is available at  
[www.smcl.org/strategicplan.html](http://www.smcl.org/strategicplan.html)