Sierra Madre Public Library

Strategic Plan

2014 – 2017

October 23, 2013

Contents

INTRODUCTION AND BACKGROUND

A strategic plan is as essential to a library's future success as a business plan is to a business' success. Like a good business plan, a library's strategic plan should note changes in the environment, track trends in the industry, be true to its brand, and review the organization's progress.

As the Sierra Madre community changes, the library's services and programs need to change with it. The last planning study was done in 2008, resulting in a long range plan for the years 2008 – 2011. In the interim, the library has continued to meet the ever-increasing demands of residents for new collections, services and technologies.

 Sierra Madre Library's last three year strategic plan expired in 2011. Since that time, both the library budget and the number of personnel has decreased.   Population growth has been slow, but service models have changed and customer expectations have escalated. Library customers expect more and consequently, library staff has had to do more -- in the same space, with fewer dollars and fewer staff, while competing with other city departments for available funds.

Trends include a greater reliance on technology, for providing content, for management and administrative functions, for communication with constituents, for self-service and for resource sharing. While technology has mitigated some of the strain on resources, it brings additional tasks which require staff time and expertise. More customers require and request training or assistance with software, Internet access, email, downloadable books, data access and self-service technology. More library customers come equipped with their own personal devices expecting the facility and its infrastructure to accommodate their use. Although not currently utilized in Sierra Madre, self-service technology is now available for circulation check out and check in, patron registration, payment of fines and fees, placing holds and reserves, on-line renewals, and checking patron records, and often is reluctantly implemented and reluctantly received.   Technology is now available for direct and less costly communication to provide information on library programs and events; availability of personal holds and reserves, over dues and fines; and to seek community input on library service needs. Social media allows the library to post, text, tweet and blog to constituents keeping them informed on all library matters quickly and cost effectively.

National trends include a slight downturn in use of expert reference assistance, a leveling off of use of circulating collections, a slight increase in program attendance, and a marked upturn in library visits. Users have become more sophisticated information seekers, requiring less professional assistance than in the past, but the library is being transformed into the community and cultural center for many communities. Customer expectations include longer hours, convenient parking, comfortable furniture, quiet spaces, meeting and gathering spaces, performance spaces, access to free WiFi and electrical power for their multiple devices, and refreshments available nearby.   While the virtual library is open for business 24/7, the physical facility cannot be. With 83% of the library's operating costs funding direct and indirect personnel costs, the hours of operation are the single largest factor in the cost of operations. Collections continue to be rated the most valuable service by library users. The library is

expected to provide access to depth and breadth of collections in multiple formats including print, large print, audiobooks, and downloadable books. Customers expect to find bestsellers, DVDs, and music CDs on the shelf, or available for reserve with a short wait time. With Amazon offering 24 hour delivery service, several days seems too long to wait for the library to deliver a desired title. As bookstores continue to close, the community's use of the library's resources for reference, self-help, technical, and leisure reading materials has held steady. For the Sierra Madre Library, lack of available shelf space has limited collection growth and requires vigilant weeding to accommodate new acquisitions.

As the community's expectations increase, the burden on the facility continues to rise. Increased visits cause additional wear and tear on the furniture, equipment, and infrastructure. Increased demand for power and data access can be met, but often at great expense. The demand for group study rooms, quiet study rooms, lounge seats, small and large group meeting rooms, teen areas and training rooms, and exhibit spaces and family places, can be met in a new or expanded facility, but for a facility that is already full beyond capacity, new services can only be added if others are eliminated or relocated. Additionally as public buildings age from constant heavy use, the demands on the infrastructure take their toll. The Sierra Madre Library currently has nine unfunded capital projects on its priority list.

As outlined in the following section, the strategic planning process enjoyed broad community participation. With data and analysis provided by the consultant, the committee and staff used benchmark data to know the competition and assess their performance relative to peers; they identified strengths, weaknesses and opportunities to understand what the library does well and ways it could better serve the community; they reviewed demographics and trends to know their customers; and they reviewed a six year performance profile to track progress and trends. A successful survey supplemented the valuable input of the Library Staff, Library Board of Trustees, and the Strategic Planning Committee.

With the increased demands from the community, rapidly changing service environment, diminishing financial resources, limited space available to provide services, a facility in need of repair and refurbishment, the Sierra Madre Library embarked on this strategic planning process to ask the community how best to spend their resources in order to serve them in the coming years.

The next section of this report identifies the process and participants that created this Strategic Plan. Wisely, the Library Board of Trustees supported strategic planning as their number one goal for this year. This plan will aid them in their stewardship of one of the community's most valuable resources.

The third section of this report includes the Strategic Goals selected by the Strategic Planning Committee and provides a context for development of achievable objectives. The library staff will now use their skills to develop new programs and services, or modify existing programs and services, to address the community's needs identified by the Strategic Planning Committee. Objectives should be developed annually in coordination with the annual budgeting process.

The final section of this document includes the data reviewed by the committee, the committee's responses to various planning activities, conclusions, and findings.

Sierra Madre, a city in Los Angeles County, California is located in the foothills of the San Gabriel Valley below the southern edge of the Angeles National Forest. Pasadena and Altadena are to its west, with Arcadia to its south and east. Sierra Madre is known as "Wisteria City", and its city seal is decorated with a drawing of the now widely known 500-foot (150 m) vine.

It is also called the "Village of the Foothills" and was an All-America City in 2007. With 500 residents, the City was incorporated in 1907 at its first citywide election when 96 citizens voted 71 to 25 to officially incorporate the City.

The City is rich in history and culture ranging from the earliest settlements, the electric car, the horse and buggy passage on the Mount Wilson Trail to its popularity today as a filming location. Local history is treasured and can be extensively researched at the Sierra Madre Public Library.

Horse and buggy passage on the Mount Wilson Trail

In the state legislature Sierra Madre is located in the 29th Senate District and in the 59th Assembly District. Federally, Sierra Madre is located in California's 26th congressional district.

The Sierra Madre City Council has five members elected to four-year terms. The Council is responsible for general city policy, as well as for the appointment of the City Manager, City Attorney, and members of the city's boards and commissions.

Downtown Sierra Madre has small restaurants and shops. There are no traffic signals within the city limits. It is truly the small town, or "the village" as it is known, with a famous Independence Day parade held every year. Sierra Madre is also known for its annual Wistaria Festival (an alternative spelling of Wisteria), which celebrates its 114-year-old, 1 acre (4,000 m²) Chinese wisteria vine,

The Sierra Madre Public Library, begun in 1887, is the fourth oldest city library in Los Angeles County and the tenth oldest in Southern California. The current building of 8,762 square feet houses a collection of about 70,000 cataloged items and a historical archives collection. The Library Services Department is one of seven departments of the City of Sierra Madre and offers a wide range of library services to adults, teens and children. Services are expanded through participation in the Southern California Library Cooperative, a network of 45 area libraries.

CITY MISSION

The City of Sierra Madre provides quality, cost effective public services that preserve the small downtown character and enhance the health, safety and welfare of the community.

LIBRARY MISSION

The Sierra Madre Public Library is a community library dedicated to providing equal access to information services and programs reflecting diverse points of view, always endeavoring to be responsive to changing needs of the community, to preserving its history, and to meeting the challenges of the future. The library provides a welcoming environment, quality materials and technologies, and professional dedicated staff.

CORE VALUES

The Sierra Madre Public Library upholds the public's right to know and:

- Provides collections of both contemporary interest and permanent value reflecting residents' current and ongoing interests and popular culture, in the formats and quantities that meet their needs
- Offers community members opportunities to gather to discuss issues and learn together and to share new experiences in the arts, sciences, and technologies

- Provides the technologies, including new multi-media resources, required to support a growing home-based business clientele and lifelong learners

- Preserves and makes available to researchers materials emphasizing the history of Sierra Madre and environs

- Makes available information, materials, and programs that will increase residents' cultural awareness of the broader community in the San Gabriel Valley and Los Angeles County

Revised and adopted by the Sierra Madre Public Library Board of Trustees on September 25, 2003.

THE STRATEGIC PLAN: PROCESS AND PARTICIPANTS

The Sierra Madre Library Strategic Plan includes both the process that lead to its findings and the strategic goals and long term objectives to be accomplished over the next three years to ensure that Sierra Madre residents continue to experience the excellent library service they have come to expect.

This plan is the result of work by the Library Staff, the Library Board and by the Strategic Planning Committee (SPC) which consisted of library staff and administration, members of the Library Board, members of library support groups, a City Council member, and local residents. These groups met with the strategic planning consultant over the course of several months to review information and identify strategic directions. This plan was developed from these discussions and shaped by community input gathered from a well-received community survey.

DATA ANALYSIS

Statistics regarding collection use, visits, program attendance, reference transactions, and other output measures were considered in the context of a six year profile. Two separate benchmark studies were developed. The first compared the Sierra Madre Library to libraries serving similar sized jurisdictions and the second, to local library jurisdictions. The library staff reviewed benchmark and library performance data; identified library strengths, weaknesses, and opportunities; and selected strategic goals and objectives which they believed to be achievable in both the long and short term.

The SPC participated in discussions on the demographics of Sierra Madre and the significance of this data in the development of library services to the community. The SPC:

- Identified social, technological, economic, and demographic trends that have had or will have an impact on the delivery of library services
- Considered the library's strengths and weaknesses, identified opportunities and the library's capacity to provide the level of library services that residents expect
- Considered specific constituents and their individual library service needs
- Agreed upon priorities, goals, and implementation strategies for the next three years

Additional suggestions were received from the 441 library users who responded to the survey. Almost 500 people in all offered ideas and suggestions for this strategic plan.

Following the Library Community Survey, conducted in summer 2012, the Library Board of Trustees met with a representative from California Association of Library Trustees and Commissioners in August 2012 and proposed four strategic visions for the Library Board of Trustees.
- Develop a strategic plan with specific activities, timelines, milestones, progress and determine three year achievable goals
- Develop a process to receive community's ideas regarding library facility (building assessment)
- Identify people not heard from in library survey and have focus groups to get their input
- Determine alternative sources of funding for library

The Library Board's top priority was to develop a strategic plan with specific activities, timelines, milestones, progress and determine three year achievable goals.

In November 2012, it was proposed to update the 2008 Library Strategic Plan and at the January 23, 2013 meeting, the Library approved the hiring of a consultant to assist with the process. Library Consultant Linda Demmers met with Library Director Carolyn Thomas to develop a work plan for preparing the Library Strategic Plan 2014-2018.

STRATEGIC PLANNING TIMELINE

- March 1, 2013: Begin reviewing documents Community Survey, Board Priorities, Board Vision, Prior Strategic Plan, Set up meeting dates with Director, staff, board, other City Departments, library support groups, community organization
- March 27, 2013: Present overview at Trustee meeting
- April 9, 2013: Library Survey Results presented by staff and Board to City Council
- April 24, 2013: Library Steering Committee members identified
- May 2, 2013: Library staff identifies Strengths, Weaknesses, Opportunities
- May 17, 2013: Steering Committee meets to select community members to attend planning meetings; consultant asked to provide additional demographic data comparing peer group and local libraries
- June 24, 2013: First meeting 19 Community members to review Library statistics, benchmarks, survey results, SWOT analysis
- July 22, 2013: Second meeting with 15 community members to prioritize top goals and identify constituent library service needs
- August 22, 2013: Second meeting with Library Staff to determine objectives to meet goals
- September 3, 2013: Steering Committee update
- October: Library staff translates strategic goals into broad achievable objectives
- October 23, 2013: Library Board receives draft of Strategic Planning Document

Library Board Members

Rob Stockly, Chair
Eugene Goss, Vice Chair
Glenn Putnam, Trustee
Pete Siberell, Trustee
Barry Ziff, Trustee

Strategic Planning Committee Members

Elaine Aquilar, City Manager
Erica Blodgett, Community Foundation
Mary Carney, Women's Club
Linda Demmers, Library Consultant
Fran Garbaccio, Senior Commission
Susan Henderson, Kiwanis Club
Shannon King, Library Volunteer
Chris Koerber, City Council
Alice Kuo, Deputy Director (former)
Carolyn Leach, Community member
Maya Ledesma, Community member
Kristin Naran, SM Arts Council
Rich Procter, Community member
Amy Putnam, President SM Historical Preservation
        Society
Glenn Putnman, Trustee
Darlene Traxler, Friends Liaison
Marianne Siberell, Community member
Norbert Siegrist, Community member
Carolyn Thomas, Library Director
Meegan Tosh, Library Services Manager
Barry Ziff, Trustee

Library Staff

Carolyn Thomas, City Librarian
Alice Kuo, Deputy Librarian (former)
Gerard Brane
Angela Deeb
Jonathan Deering
Lori Garza
Debbie Henderson
Ada Hennessy
Donna Howard
Susie Quinn
Mellanie Reeve
Kim Steffens
Jill Schofield
Sherry Sue
Meegan Tosh
Shazia Wilson

STRATEGIC GOALS 2014 – 2017

The Strategic Planning Committee considered Sierra Madre's current environment, assessed the library's strengths and weaknesses, discussed suggestions from community members, and considered trends and best practices in library service for now and the foreseeable future. Based on their careful consideration, the Strategic Planning Committee recommends that the library focus its attention on these five strategic goals for the term of this plan.

GOAL 1: *Improve the public's awareness of library services, explore new ways of communicating with the community, and facilitate the public's access to information about library services.*

GOAL 2: *Seek stable sources of funding to sustain current levels of service, hours of operation, and programs.*

GOAL 3: *Expand and improve the use of new technologies to provide access to library materials, information about library service, and help customers connect to the digital world.*

GOAL 4: *Provide a facility that is comfortable and welcoming, safe, energy efficient, accessible for all and well organized.*

GOAL 5: *Develop collections that meet the community's needs including local history materials.*

GOAL 1: *Improve the public's awareness of library services, explore new ways of communicating with the community, and facilitate the public's access to information about library services.*

Objective: Develop marketing campaign to promote library services using print, online and social media as marketing tools

Objective: Evaluate, recommend and implement improvements to the Library Homepage which clearly publicize programs, collections, and services and track usage

Objective: Implement ability to pay library fees online

Objective: Target outreach to local community groups, schools, neighborhoods to promote library services by engaging Trustees, Friends, and volunteers of all ages as library ambassadors.

Objective: Update Trustee Bylaws to promote library advocacy.

Measurable Outcomes

2014 – 2015 Increased number of borrowers

2014 – 2015 Increased attendance at adult library programs

2014 – 2015 Increased visits to library web page

2014 – 2015 Increased use of self-service options on web page

2014 – 2015 Librarian initiates annual "State of the Library" to increase community awareness of library issues and opportunities

2014 – 2015 Cosponsors programs with other organizations to leverage outreach

2014 – 2015 Trustees appoint Bylaw sub-committee to review and propose amendments to existing bylaws

2014-2015 Review and revise Library Mission Statement

2015 - 2016 Ability to pay fees and fines online

Comment

The number of borrowers has decreased in recent years and program attendance has declined. Many survey respondents were unfamiliar with basic services, including the local history program. Staff is limited in number to embark on a major public relations campaign; funding is unavailable for additional staff. Co-sponsorship of programs leverages outreach opportunities. If capital projects are unfunded, the library must seek new support groups through outreach efforts and through public information; i.e., an annual state of the library address. Low cost methods of outreach must be employed including social

media as well as traditional forms such new resident welcome packets , banners on site, a presence (booth) at local events, bookmarks, license plate carriers, and interaction with local businesses.

GOAL 2: *Seek stable sources of funding to sustain current levels of service, hours of operation, and programs.*

Objective: Submit annual budget request to support groups of the library (Friends, Community Foundation, etc.) to sustain collections, capital improvements, and programs.

Objective: Identify unfunded library projects and priorities and seek fundraising opportunities to support projects.

Objective: Secure funding for maintaining staffing levels for existing open hours.

Measurable Outcomes

2014 – 2015 Work with the Friends of the Library to build their contributions into the annual budget

2014 – 2015 Explore simple fundraising options including an on-line donation plan

2014 – 2015 Explore all options for cost savings including use of technology, volunteers, and partner organizations

2014 – 2015 Research options for revenue enhancement; e.g., DVD rental charge, but not at the expense of the public's good will

2014-2015 Evaluate possibility of adding morning hours.

2014 – 2015 Receive grant funding for one library program that the annual budget would not afford

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Comment

The City Librarian and her administrative team have been extremely successful in securing grants totaling $62,300 in the past year. These funds do not necessarily help to defray the annual operating costs, but have allowed the library to add additional programs and services. The library must fully assess the implications of any grant which might bring with it additional operating costs. With one of the lowest operating budgets of its peer group, the Sierra Madre Library operates on a very thin margin and there are few cost savings remaining that could be entertained without a drastic reduction in hours of operation or other basic services, or at the expense of the public's good will. The Friends must be acknowledged for their funding of all databases, DVDs, eBooks, audiobooks, Large Print books, program, printing and technology. With a half dozen unfunded capital projects, the library must seek additional funding. The creation of a Library Foundation to raise funds for larger projects was unsuccessfully launched several years ago. The Board, Library Administration, and City staff and elected officials might consider attempting this again. The Library Board remains the primary group responsible for the financial health of the library and their priority must remain advocacy for the library.

GOAL 3: *Expand and improve the use of new technologies to provide access to library materials, information about library service, and help customers connect to the digital world.*

Objective: Implement an updated ILS system.

Objective: Explore RFID technology for cost savings and staff efficiency.

Objective: Develop plan and timeline for posting city ordinances and resolutions on-line.

Objective: Provide self-service options for many library services.

Objective: Develop training plan for all staff to meet technological competencies and assist in managing city website.

Objective: Identify and offer training opportunities to the public for accessing library material

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Measurable Outcomes

2014 – 2015 Create a staff subcommittee to draft a technology plan including short term hardware and software requirements as well as a list of core technology competencies based on regular public service requirements

2014 – 2015 Research ILS requirements and develop a budget for 2015 – 2016 implementation

2014 – 2015 Reconfigure circulation area to provide space for a self-check/self-service area

2014 – 2015 Develop a list of on-line, self-paced, and local computer workshop available

2015 – 2016 Assess self-service options for reserves, media check-out, patron, and computer reservation

2015 – 2016 Create training and testing tools for staff to acquire basic technology competencies

2015 – 2016 Create a staff team that has extended technology skills who can provide back up to other city personnel

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Comment

The Library has fewer public use computers and a lower PC use per capita than either the peer group or the local group (Benchmark study). With limited space available, and one of the two individual rooms allocated to computer use, the library should consider migrating to a laptops, freeing up valuable space in two locations. Survey respondents indicated a lower interest in computer classes and as these use costly staff time, the library should explore using teen, college student or other volunteers as trainers or providing information on other locations that offer technology training. One exception to this might be training in the use of eBooks, particularly if the Library is considering increasing eBook holdings and shifting budget allocation from print materials to digital. The Integrated Library System (ILS) will be the single largest purchase that the library makes, excluding capital facility improvements. A committee should begin investigating options now for a 2015 – 2016 acquisition. One further consideration would

be to implement RFID technology. RFID self-check machines and inventory control gates are significantly cheaper than the current magnetic strip technology. The cost to install RFID tags into a collection of this size would be recouped in a few years with cost savings on inventory and weeding projects, multiple item check-in and check-out saving staff time, and easy customer self-check. If the staff can't do it, then it's probably a service the library shouldn't be offering.

GOAL 4: *Provide a facility that is comfortable and welcoming, safe, energy efficient, accessible for all and well organized.*

Objective: Draft a Library Facilities Master Plan and obtain City Council approval to assess library structure and capital projects.

Objective: Install ADA accessible shelving throughout library.

Objective: Develop a continuous weeding plan to ensure accessibility and usability of collection.

Objective: Increase seating and study area in facility.

Measurable Outcomes

2014 – 2015 Review all unfunded facility capital projects and set priorities

2014 – 2015 Weed 20% of existing adult collections to create a working collection shelf load

2014 – 2015 Refine costs with detailed plans for compact shelving in lower level

2014 – 2015 Rework customer service area and public service desks

2015 – 2016 Develop a committee to draft a Facility and space needs analysis and identify long term goals

2015-2016 Refine costs with detailed plans for shelving replacement on main level

2015 - 2016 Reorganize shelving on main level to provide clearer sight lines into the collections area creating a more welcoming and accessible area

2015 – 2016 Install compact shelving on lower level

Comment

Areas of the library facility are underutilized while others far exceed a desirable density factor. An initial assessment suggests that the book stacks are occupying too high a percentage of "prime real estate" and that there is a pressing need to lighten the load to create more public space. The oversized public service desk is a dinosaur in the age of self-service technology and a space plan should be developed for that area to return staff space to public use. Desktop computers occupy space that is then not available for other use and are not in use full time. The desire for quiet study or a small group meeting room might be satisfied if the current computer room were made available for those purposes. The large basement is underutilized, and the slab on grade makes it a perfect candidate for compact shelving, which triples the storage capacity. Many libraries place less used items in on-site storage that is inaccessible to the public, but is easily retrieved by staff. Until the new facility was built, San Marino Library housed all pre 1976 fiction on shelves in the basement level. The most basic way to create extra space in the library is to increase circulation of existing collection, thus freeing space for other collections and to provide opportunities for remote access for users that will then NOT need to visit the physical facility. Any remote use, e.g., eBook download, payment of fines and fees, renewal, placing

holds and reserves, lightens the load of patrons in the facility. Finally, the excellent suggestion was made to "green" the building. This must be implemented as soon as funding permits and is in alignment with the city wide goals to promote environmental sustainability.

GOAL 5: Develop collections that meet the community's needs including local history materials.

Objective: Update Collection Development Policy to include all collections.

Objective: Implement programs for all ages that promote library's collections.

Objective: Expand and keep current eBook and technology collections.

Objective: Develop two new local history categories per year for digital storyboards

Objective: Inventory Local History Collection including Rare books, California Collection and Archival material and improve access, both digitally and on-site.

Measurable Outcomes

2014 – 2015 Reallocate funding from print collections to increase funding for eBooks.

2014 – 2015 Evaluate little used collections, e.g., Play-aways, magazines and databases and cancel underutilized collections .

2014 – 2015 Create library subcommittee to update collection development policy to include local history and art collections.

2014 – 2015 Review the teen collection, weed and replace as needed. Refresh collection by at least 20%. Measure success by increased circulation of teen materials.

2014 – 2015 Continue development of the digital story board adding two new categories.

2014 – 2015 Implement teen docent program to promote digital story boards.

2014 – 2015 Explore additional book clubs/reading groups.

Comments

The primary impediment to adding new service is lack of space and the primary occupier of space is collections. The stack areas are dense, and uninviting, perhaps contributing to the low circulation rate. Collections which are not weeded and refreshed become shelf sitters; shelf sitters tie up valuable prime real estate. Survey respondents asked for more new materials, bestsellers and popular titles. There are a number of ways to create space for new services and collections-- increase the circulation of collections, freeing up valuable shelf space; replace print with eBooks; weed collections to lighten the shelf load; and create a remote storage area in the basement or off-site for little used titles to be accessed on call. A collection development policy would mandate when a title is weeded and when it is removed to storage. Based on current use, certain collections; e.g., teen materials, should be weeded

heavily immediately and replaced with more contemporary materials. The local history program is one of the stars of the library's offerings. This should be more heavily promoted, provide more opportunities for volunteers, and be showcased for events that might also be used as fundraising opportunities. The city also has a community of serious readers as noted by the strategic planning committee. Book clubs, staff picks, blogs, and author talks would serve this group well and could be volunteer or community driven events which the library and the friends support.

DEMOGRAPHICS: WHO LIVES IN SIERRA MADRE

The population of Sierra Madre is relatively stable with an increase of less than 400 residents from 2000 to 2010. The median age is older than the rest of California and the United States with fewer residents under the age of 5, under the age of 18, and under the age of 65. There has been a decline in children under the age of 5 in the past 10 years and an increase in the number of persons over the age of 65.

	Sierra Madre 2010	California	United States	Sierra Madre 2000
Population	10,917	37,253,956	308,745,538	10,578
Median Age	46.6	35.2	37.2	42.6
Persons under 5	4.7%	6.8%	6.5%	5.3%
Persons under 18	19.1%	25%	24%	18.9%
Persons over 65	17.4%	11.4%	13.0%	15.7%

The residents are slightly more ethnically diverse than in 2000 with the number of foreign born residents having increased as well as the percent of the population that speaks a language other than English in the home. The population is less diverse than the rest of California and the United States. It is less ethnically diverse than neighboring communities such as Altadena where 33.2 % or South Pasadena where 35.9% of the population speaks a language other than English in the home.

	Sierra Madre 2010	California	United States	Sierra Madre 2000
Race: White	82.1%	57.6%	72.4%	89.4%
Hispanic Origin	14.9%	37.6%	16.3%	10%
Foreign born	12.9%	27.2%	12.8%	10.5%
Language other than English in home	16.6%	43.2%	20.3%	12.8%

The population is more affluent and more educated than the residents of California and the United States. The per capita income is nearly double that of the rest of the State. The median value of housing is nearly double the rest of the State and more than three times the median for the United States.

	Sierra Madre 2010	California	United States	Sierra Madre 2000
Per capita income	$52,221	$29,634	$27,915	$41,104
Median household income	$84,487	$61,632	$52,762	$65,900
HS graduate or higher	96.5%	80.8%	85.4%	94.5%
BA or higher	57.4%	30.2%	28.2%	49.7%
Median value of housing	$770,500	$421,600	$186,200	$370,500

In general the family size and household size in Sierra Madre is smaller with fewer residents under the age of 18 than the rest of the state and the country. There is little vacant housing available and residents tend to be long term residents. At nearly 62%, there are more owner occupied housing units than in nearby South Pasadena with 47.1% but less than neighboring Altadena with over 74% owner occupied housing.

	Sierra Madre 2010	*California*	*United States*	*Sierra Madre 2000*
Average family size	2.89	3.45	3.14	2.87
Persons per household	2.26	2.9	2.58	2.2
Occupied housing units	94.6%	91.9%	88.6%	96.6%
Homes with occupants <18	25.8%	37.5%	33.4%	24.8%
Owner occupied housing	61.8%	56.7%		62.6%
Living in house 1+ years	91.9%	84.2%	84.6%	85.3%

The demographics of Sierra Madre suggest a community of heavy library users with high expectation of library services. The education level and income level of the population points to a community that expects the highest quality public service, which includes libraries along with schools and other public amenities. Residents with a longer tenure in the community become more involved in public affairs as do homeowners, who take greater ownership and pride in their public library. This same demographic should be considered as individuals who would support the library, both as volunteers, board members, and through financial contribution.

While the number of children seems small as a percentage of the total population, the 19% currently represents over 2,000 youth and they are currently well served by the library. The collections and programs are highly rated and the recent renovation of the children's room was extremely successful. This is a population that is well served by the library.

Senior citizens are among a library's heaviest users, sometimes visiting the library daily as library patrons as well as filling out the ranks of library volunteers and supporters. Seniors represent a higher percentage of the population than in either the state or the country, and as noted by the strategic planning group, seniors are not necessarily the best served constituents. Some recommendations included the adding morning hours, purchasing ergonomic furniture, and partnering seniors with teens as "technology buddies." These are all low cost/ low space utilization possibilities to enhance service to this valuable segment of the population.

The non-English speaking population is fairly small, significantly lower than neighboring communities and not yet at a position to effect collection development policies. The slight upturn might indicate a trend, and it is worth watching as the addition of materials in other languages will affect both the library's budget and its space utilization.

	2005-6	2006-7	2007-8	2008-9	2009-10	2010-11
Books per capita	5.38	5.66	5.42	5.48	5.41	5.2
Items per capita	6.68	116.77	6.55	6.6	6.58	6.37
PCs per 1,000			.72	.72	.72	.72
Expend per capita	$58.70	$67.31	$69.87	$66.62	$74.16	$78.23

Sierra Madre Profile: Input Measures

	2005-6	2006-7	2007-8	2008-9	2009-10	2010-11
Circ per capita	9.22	7.42	8.19	9.16	9.69	10.17
Visits per capita				8.11	8	8.37
Program att per cap			.81	.62	.52	.58
PC use per cap			1.27	1.15	1.29	1.28
Ref per capita	.63	.65	.52	.51	.6	.71

Sierra Madre Profile: Output Measures

	2005-6	2006-7	2007-8	2008-9	2009-10	2010-11
Books per capita	2.15	2	1.95	1.97	1.93	1.88
Items per capita	3.19	3.41	3.36	3.23	2.72	2.68
Pop per FTE	3,019	2,925	2,945	3,092	3,266	3,429
PCs per 1,000			.2	.22	.21	.22
Exp per capita	$29.39	$31.74	$32.96	$34.96	$32.70	$32.36

State Profile: Input Measures

	2005-6	2006-7	2007-8	2008-9	2009-10	2010-11
Circ per capita	5.3	5.44	5.78	6.21	6.33	6.41
Visits per capita	4.09	4.24	4.35	4.8	4.59	4.49
Program att per cap			.2	.22	.21	.22
PC use per cap				1	1	1
Ref per capita	.86	.8	.86	.95	.91	.71

State Profile: Output Measures

Input measures for the Sierra Madre Library have remained fairly constant over the previous six years with the only major increase being in the operating costs. With over 80% of operating funds being allocated to personnel costs, this increase is due largely to increased costs of personnel, but without the benefit of increased personnel. In fact, the number of FTEs employed by the library has decreased from

13 in 2008 to 10.5 (proposed) in 2013. Other input figures, including volumes held, PCs available, reader seats, and program space, are virtually frozen at recent and current levels due to the limitations of the facility space available for expansion.

In spite of the limitations on growth and the decrease in the number of staff available for program implementation, collection development, and outreach, the output measures have continued to climb just slightly, but in advance of the population growth. With fewer personnel and a static service population, use has continued to increase.

Compared to the state averages, output measures far exceed the state mean. Visits per capita are nearly double the state average. Circulation per capita exceeds the state by more than 50%. Program attendance is close to triple the state average, which is extraordinary for a library that has no public meeting space! Reference is exactly at the state average and PC use is 25% higher. In some cases, such as PC use, the input measure is nearly triple the state measure, but the output measure is only 25% higher indicating an area where growth is not required, where outreach is required, or the demographics indicate that the library does not have an overwhelming need to provide this equipment for the public.

A recent downturn in circulation of library materials can be attributed to the implementation of rental fees for DVDs. While this policy has added some revenue for the library, it has caused a decrease in circulation by 20,000 the first year. The impact of this on the use of DVDs and public goodwill is worth revisiting after the first full year.

To get a better picture of the performance and needs of the Sierra Madre Public Library, the consultant conducted two benchmark studies – one comparing Sierra Madre to similar sized jurisdictions, the second comparing it to local jurisdictions.

In the absence of quantitative planning guidelines, public libraries frequently utilize benchmarking to compare their available resources and performance with peer institutions. These measures, typically on a per capita basis, can be useful in assessing how effectively a library uses the resources available and a jurisdiction can use these comparisons to measure its return on investment. Markers include circulation per capita and the number of circulations per item to gauge the appropriateness of the collection and its usage. Other measures such as cost per hour, cost per capita, and cost per square foot can help to gauge the cost effectiveness of the library operation. For the Sierra Madre Public Strategic Plan, the consultant conducted two benchmark studies – one for institutions serving jurisdictions of similar size and one for local jurisdictions. The results and discussion follow.

The peer group included the following libraries: Sausalito, Sierra Madre, Belvedere-Tiburon, Larkspur, San Anselmo, San Marino, and Mill Valley. These jurisdictions were selected based on size of service population and demographic similarities. County and branch libraries were excluded from the study.

The local group included the following libraries: Sierra Madre, San Marino, South Pasadena, Monrovia, Altadena District, Arcadia, and Alhambra. County and branch libraries (and Pasadena) were excluded from the study. Three of the local group, San Marino, Monrovia, and Alhambra have recently completed library building projects.

	Sierra Madre	Peer Group	Local Group	State Average
Borrowers per capita	1.03	1.07	1.37	
Square Feet per capita	.80	1.09	.97	
FTEs per 1K	.96	1.09	.65	
Operating Expense per cap	$78	$98	$57	$32
Hours per Capita	.21	.25	.10	
FTE per Hour	8.98	8.65	14.94	
Cost per Hour	$366	$400	$691	
Salary % budget	77%	74%	74%	
Volumes per capita	5.2	5.65	3.39	1.88
Circulation per capita	10.17	16.87	10.8	6.41
Circulation per hour	48	70	132	
Turnover	1.97	3.09	3.08	
Reference per capita	.71	1.71	1.33	.71
Visits per capita	8.37	13.79	10.43	4.41
Program attendance per cap	.58	1	.59	.22
PC Use per capita	1.28	2.21	2.1	.91
PCs per 1K	.7	1.14	1.21	.53

Source of data: California State Library 2011 – 2012 Annual Report

Benchmark Analysis

The number of borrowers per capita exceeds the population of the library service area, but is lower than either the peer group or the local group. As noted in the six year profile, the number of borrowers has declined in the past six years.

The facility remains at .8 square feet per capita, below the peer group and the local group. Newer facilities in the local group include Alhambra at .54 square feet per capita, Monrovia at .76 square feet per capita, and San Marino at 2.2 square feet per capita. In general, with the exception of branch libraries, the smaller the jurisdiction, the higher the number of square feet per capita required to provide basic library functions. At .8 square feet per capita, Sierra Madre is slightly above all new library construction in the past ten years at .66 to .75 square feet per capita, and slightly below smaller independent municipal libraries at 1.0 to 1.5 square feet per capita.

The number of library staff at the Sierra Madre Library is below the peer group and above the local group, but as noted above has declined during the past six years. Additionally worth noting, the Sierra Madre Library staff also performs city administrative functions including archive and web management in addition to the core library functions. These functions account for approximately 1.0 FTE of the total staff.

Annual operating expenses and cost per hour are below the average of the peer group. Cost per hour is far below the cost per hour for the local group, most of which are supporting larger facilities and staff. At $366.00 per hour, library services are a bargain to the residents of Sierra Madre!

The collections are robust based on the size of the service population. At nearly three times the state average for volumes per capita, residents have a wide array of materials available to them. However, the low turnover rate at 1.97 compared to the 3.09 for the peer group and 3.08 for the local group indicates that this collection is underutilized with a high percentage of "shelf sitters."

An exceptionally low turnover rate (total annual circulation divided by total number of holdings) may indicate that the collection is outdated, inappropriate, or inadequate for the service population. An exceptionally high turnover rate may indicate a hardworking collection that may need to be expanded to meet the needs of the service population. Individual collections can be evaluated based on their turnover rate; e.g., DVDs, picture books, easy readers are almost always a library's highest circulating item. Adult non-fiction in specific categories is almost always a library's lowest circulating item. This tool can be an effective collection development and weeding tool.

The circulation per capita is below the benchmark for both groups, substantially below the peer group, again indicating as the turnover rate, that the collection requires assessment.

Additionally, comparing the benchmarks for square feet per capita which is under the benchmark by 27% with the collections per capita, which is equal to the benchmark, it is evident that the facility is

carrying a heavier load of collections at the expense of other public areas including reader seats and meeting spaces.

The program attendance is below the peer group, but equal to the local group, and nearly triple the state average of program attendance per capita. This speaks to the diligence and creativity of the staff in presenting quality programs in spite of the lack of a community room and it speaks to the desire of the public for cultural and educational programming in their own community. Note here that neighboring city, South Pasadena has an extensive and well publicized program schedule and that all of the new facilities in the area have high-end multipurpose meeting and performance spaces that seat approximately 100 individuals.

In spite of the shortage of seating and the lack of quiet reading and study space, the visits per capita are nearly double the state average. Visits per capita are 40% below the peer group – hours are 20% below the same group and facility size is 27% below the same peer group – both factors affecting library usage.

PC usage is below both peer and local groups as is the number of PCs per capita. PC use exceeds the state average by 41%; the number of PCs per capita exceeds the state average by 32%.

In general where the input measures were exceeded by the peer or local group, the output measures were also exceeded, but by a smaller percentage. In all cases, except for reference per capita, Sierra Madre Library exceeded the state average, in some cases by 200% or more. Weighing the relative difference in input and output measures, the Sierra Madre Library is doing more with less, for less money.

WHAT DID THEY SAY: COMMUNITY SURVEY

A community survey was conducted in July and August 2012.   Surveys were distributed to residents in the July and August water bill. Respondents could return the survey by mail, participate in the survey on-line, or fill out a paper copy and return to the Sierra Madre Library. In all 441 surveys were completed.

Respondents gave library customer service a 99% approval rating noting the library and staff to be friendly, helpful, comfortable and convenient. Children's programs are popular and well attended.

Respondent profile:

- 89% Sierra Madre residents and have a library card
- One-third 65 or older
- Most come to the library to borrow books, bestsellers, DVDs, or books on CD
- Only one-third use the library computers for work
- Less than 21% know about California collection

Respondents requested the following:

- More eBooks
- Private study areas
- Ability to pay fines and fees on-line
- Weekday morning hours
- Consistent customer service
- Email option for overdue notices
- More information about local history resources

Services which received lower ratings and will be evaluated include computer classes, adult programs, and data bases. Resistance to DVD charge was reported.

Improvements requested include the following:

- Use social media to promote programs and services
- Expand teen volunteer program
- Expand outreach
- Review periodical subscriptions

Based on the community survey responses, the following are recommendations for future action and will be considered in the strategic plan:

- Increase eBook purchases
- Identify quiet study space
- Implement online payment options
- Improve access to and promote local history resources
- Review magazine subscriptions – less than 58% read magazines
- Evaluate databases and Playaways
- Consider reinstating weekday mornings – 52% requested the library be open in the morning
- Increase number of library users
- Train public in use of online resources
- Develop consistent standards for customer service
- Find alternatives for computer classes – less than 13% are interested in computer classes
- Review and develop new programs
- Engage trustees

I. Library Strengths

    a. Staff/Customer Service

    b. Collections

    c. Local History

    d. Technology

    e. Children's Services

II. Weaknesses

    a. Facility: Space, Layout, back of house, deferred maintenance

    b. Collections (selected)

    c. Funding

III. Ways to better serve the community

    a. Facility: Redesign existing space, reconfigure service desk, remodel

    b. Collections: Better access, update, teen collections, eBooks

    c. Outreach: Publicize with social media, partnerships, community presence, new services, identify underserved groups

HOW ARE WE DOING: STAFF SELF-ASSESSMENT APRIL 2013

	Strongly Disagree (1)	Disagree (2)	Agree Somewhat (3)	Agree (4)	Strongly Agree (5)	Average Response
The SMPL needs an updated facility.				1	8	4.89
The SMPL provides excellent customer service.				2	7	4.78
The SMPL offers excellent story time programs.				3	6	4.67
The SMPL needs a larger facility.		1		1	7	4.56
The SMPL provides expert assistance to customers.				5	4	4.44
The SMPL offers excellent children's reading incentive programs.			1	4	4	4.33
The SMPL offers current technology.			1	5	3	4.22
The SMPL offers excellent service and collections for senior citizens.			1	5	3	4.22
The SMPL communicates well with individual customers (holds, over dues, etc.)			1	7	1	4.00
The SMPL supports the school curriculum.			4	4	1	3.67
The SMPL met the goals of the 2008 Plan			2	4		3.67
The SMPL communicates its services to the community.		1	2	6		3.56
The SMPL offers a wide variety of cultural and educational programs.		1	4	4		3.33
The SMPL manages change well.		1	4	3		3.25
The SMPL has adequate collections to support customer needs.		1	5	3		3.22
The SMPL is open sufficient hours.		1	6	2		3.11
The SMPL provides excellent service to teens.		1	7	1		3.00
The SMPL has adequate staff to provide excellent service.		3	6			2.67
The SMPL is adequately funded.	2	5	2			2.00

I.   Strengths
    a.   Reputation
    b.   Friendly, inviting space
    c.   Places to study/read
    d.   Staff, knowledgeable and caring, productive
    e.   Public events, creative programming
    f.   New books
    g.   Books on CD
    h.   Variety of collection
    i.   Friends of Library, book sales
    j.   Children's programs
    k.   Volunteer support
    l.   Landscaping
    m.   History, ancestry
    n.   Available computers
    o.   Hours

II.   Weaknesses
    a.   Lack of community room
    b.   Marketing of services and opportunities
    c.   Technology
    d.   Web page
    e.   Furniture
    f.   Foreign language sections
    g.   Internet
    h.   Morning hours
    i.   Opportunities for teen volunteers
    j.   Limited shelf capacity
    k.   Lack of space
    l.   Facility needs updating
    m.   No group study rooms
    n.   Not enough staff
    o.   Outdated ILS (Integrated Library System)
    p.   Appeal to teens
    q.   Funding
    r.   Acoustics/Noise control
    s.   Limit to renewals
    t.   ILL Loan procedure unclear
    u.   Need book due alerts

III.   Ways to better serve community
   a. Hours
   b. Media
   c. More eBooks
   d. More space, community room,
   e. Increase visibility in community, stage events
   f. Teens: engage volunteers, outreach, study area for
   g. More programs with music and authors
   h. More educational programs
   i. Campaign for fund for special needs
   j. Modular structure for friends
   k. Campaign for special needs
   l. Improved electronics
   m. Presentations on local issues
   n. Change renewal policies
   o. Book due alerts
   p. Promote reading with book clubs and author appearances
   q. Use website for good reads, picks and pans
   r. Outreach to growing demographic (over 50s)
   s. Partner with local businesses and community groups to promote library programs
   t. Outreach: advertise at local schools; advertise in water bill, use social media, Patch

The Strategic Planning Committee shared its insight into the Sierra Madre community, focusing on specific constituent groups and identifying areas where targeted library services might be required. These recommendations were shared with the library staff for discussion. They do not become de facto action items. As noted by one board member, the library cannot be all things to all people – the budget will not permit. Other organizations also provide needed services; additionally, the library staff noted in their review that some of these suggestions had already been implemented or tried without success. The following list provides a useful snapshot of where the library might focus in the coming years to provide additional services to the community as resources become available and better serve the community.

I.   School Children
   a. Expand collections, including series, easy readers, classics, audiobooks, DVDs
   b. Separate teen area
   c. Increase volunteer opportunities for teens
   d. Use social media to post daily events
   e. Explore more portable technology including iPads

II.   Young Parents
   a. More early childhood materials; e.g., board books
   b. Less technology for younger children
   c. Host Mothers of Preschools
   d. Continue excellent story time, and children's reading programs

III.   Teens
   a. Review collections and increase holdings of more popular materials including vampire fiction and graphic novels
   b. Comfortable furniture age-appropriate
   c. Increase outreach by offering community service hours, volunteer opportunities, and teen sponsored events
   d. Implement a Teen/Senior one to one technology assistance program
   e. Teen volunteers to work with Junior High Students and summer reading club

IV.   Seniors
   a. Evaluate collection use
   b. Replace furniture with more ergonomic chairs, comfortable seating
   c. Offer more daylight hours preferably morning
   d. Eliminate any physical challenges to use of facility and collections
   e. Evaluate lighting throughout
   f. Outreach using other services; e.g., Meals on Wheels
   g. Implement services including Titles to Go and book clubs

V.   Avid Readers
   a. Sharing including blogs, reader posts of "likes", staff picks, etc.

b. Collections more accessible
c. Comfortable reading chairs
d. Citizen ambassadors for library, I love my library license plate holders, buttons
e. Button on website for online donations to support the library, low cost fundraising
f. Use technology – web presence, Good Reads, Book Reviews online, New book alert, novelist
g. Programs – local author program
VI. Technology
a. Investigate and budget new ILS system
b. More broadband for faster connect
c. Free up existing computer room for other purposes, relocate PCs
d. Promote on-line databases

WHAT'S NEEDED: CAPITAL PROJECTS

Priority	Capital Project	Estimated Cost
1	Electrical system upgrades (in progress)	$40,000
2	Reorganization of local history collections and space (in progress)	$25,000
3	Remodel staff work area*	$10,000
4	Exterior painting*	$25,000
5	Construction of ramp to access basement*	$10,000
6	Implementation of California Preservation Assessment Plan*	$5,000 - $20,000
7	Purchase and install secure storage for artwork*	$30,000
8	Creation of separate area for Friends operations*	$10,000
9	Master plan lower level, purchase and install compact shelving for basement storage*	$40,000 – 60,000

* currently unfunded