

# **Santa Clara County Library (SCCL)**

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## **Strategic Plan**

*(Adopted October 23, 2008)*

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## **EXECUTIVE SUMMARY**

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The Santa Clara County Library engaged in an aggressive strategic planning initiative positioned to develop a renewed sense of direction and focus for the Library in order to build on its current strengths and success in order to better serve the communities it represents. The goal of this initiative was to create clarity and focus on how the Library should invest its valuable resources on the identified wants, preferences, and needs of its current users as well as create opportunities to expand its user base. The Library considers this strategic plan to be a dynamic document; open to revisions, in order to continually provide value to the communities it serves.

The project began with the collection and review of several user and non-user secondary research studies conducted by individual community libraries within the Santa Clara County Library system as well as one major study conducted by the library system representing hundreds of households within the service area (see attached list of research resources). In addition, in-depth telephone interviews were conducted with a variety of important stakeholder groups by the strategic planning consultant (see attached biography). With the user and non-user research in hand, a cross-functional Library staff team engaged in a dynamic planning process led by the strategic planning consultant.

As an initial step, the staff team created an “Envisioned Future” for the Library considering a 10-15 year planning horizon. The “Envisioned Future” consists of two elements, a BHAG (Big Hairy Audacious Goal) and a “Vivid Description of the Desired Future.” The BHAG is an audacious goal designed to create a catalyst for future growth. It is straightforward and compelling with a clear finish line. A “Vivid Description of the Desired Future” articulates how the Library, its patrons and the community will benefit from achieving the BHAG.

The following “Envisioned Future” was created to build on the Library’s strengths and to stretch the Library for future growth and sustainability:

### ***Envisioned Future***

***BHAG:***

*Building upon our reputation for service excellence, the Santa Clara County Library will have the highest percentage of library service area cardholders in the nation.*

### ***Vivid Description of the Desired Future:***

*The Santa Clara County Library is viewed by its patrons as an invaluable resource for information, entertainment, and ideas. Patrons recognize the library as convenient, easy-to-use, and technologically adept. Patrons understand the value of the system as well as their community library and actively encourage others to use the library. Residents appreciate the importance of having free, nonjudgmental, and convenient access to services and resources.*

*The number of residents actively using the library has increased year after year as a result of the library's commitment to providing targeted services both virtually and physically, making services more convenient, and making service area residents aware of the value of its services. The library constantly monitors changes in the demographics of the service area and adapts to those changes to better serve both traditional and non-traditional library patrons. Patrons acknowledge the availability and accessibility of materials when and where they desire them.*

*The library staff plays a vital role in the success of the library. Perceived by patrons as knowledgeable and responsive, the staff is adaptable to change and committed to continuously meeting the evolving needs of the patrons. Staff is committed to professionalism, collaboration, communication, innovation and providing convenient and accessible programs and services.*

*As a result, the Santa Clara County Library is one of the most used and valued library systems in the nation. The library is a vital and responsible community partner. It enjoys consistent, enthusiastic, vocal, and overwhelming community support.*

In order to move toward achieving their "Envisioned Future," the Library Staff Team identified three specific areas to focus on in the next five years:

- ***Convenience:*** Making Library services more convenient for prospective and current users.
- ***Public Awareness and Marketing:*** Creating greater awareness of how the Library is relevant to prospective users.
- ***Information Literacy:*** Enhancing the Library's role as a trusted source for information and resources.

The following pages provide additional elements of the Library's Strategic Plan as well as the sources for research and data in support of their focus and future direction.

**TIMELESS ELEMENTS**  
**~ CORE IDEOLOGY & CORE VALUES ~**

*Core ideology describes an organization's consistent identity that transcends all changes related to its relevant environment. It consists of two elements - **core purpose** – the organization's reason for being – and **core values** – essential and enduring principles that guide the organization. **Envisioned future** conveys a concrete yet unrealized vision for the organization. It consists of a **big (hairy) audacious goal (BHAG)** – a clear and compelling catalyst that serves as a focal point for effort – and a **vivid description** – a vibrant and engaging description of what it will be like to achieve the BHAG.*

### **Core Ideology**

**Core Purpose:**

To enable unbiased, informed, and free access to information, entertainment, and ideas.

**Core Organizational Values:**

- Committed to a positive patron experience.
- Respects the individual and provides quality services in a nonjudgmental way.
- Promotes the love of books and the importance of reading.
- Ensures equal and open access to one relevant, diverse, and substantial collection for the entire community.
- Fosters life-long learning, promotes cultural enrichment, and supports education.
- Recognizes and respects staff as valuable and essential to quality library services today and into the future.
- Welcomes volunteers and appreciates their contributions of time and talent.
- Ensures that physical spaces are welcoming, safe, clean, and accessible.
- Committed to intellectual freedom and the privacy rights of all patrons.

**3-5 YEAR PLANNING HORIZON**  
**~ OUTCOME-ORIENTED GOALS AND OBJECTIVES~**

*The following are goals for the next five years. These goals represent areas of focus and outcomes in which the Santa Clara County Library explicitly states the conditions or attributes it wants to achieve. These outcome statements define “what will constitute future success.” The achievement of each goal will move the organization toward realization of its vision (vivid description). The goals are not listed in priority order.*

*Objectives provide direction for how the organization will accomplish its articulated goals. Objectives are considered in the 3-5 year planning horizon. Strategies (actions), metrics (tools to measure success) and action plans are created in support of the listed objectives. Accomplishment of goals and objectives are measured annually while strategies are reviewed regularly.*

## **Goals and Objectives**

### **Goal Area: Convenience**

**Goal Statement: More service area residents use the library as a result of added convenience.**

Objective 1: Increase the library’s understanding of the conveniences most important to prospective patrons.

Objective 2: Increase access to the library’s physical space.

Objective 3: Enhance the library’s technology so that it is current, reliable, available, and easy-to-use.

### **Goal Area: Public Awareness and Marketing**

**Goal Statement: More service area residents recognize the library as relevant to their lives.**

Objective 1: Increase staff’s ability to market to targeted groups.

Objective 2: Enable non-users to connect their needs to library resources and services.

Objective 3: Enable staff and patrons to advocate for and promote library usage.

**Goal Area: Information Literacy**

**Goal Statement: More service area residents choose the library as their trusted source for free, high-quality information.**

Objective 1: Increase the public's use of reference services.

Objective 2: Enhance the ability of patrons to navigate and fully utilize the library's resources.

Objective 3: Expand the staff's ability to deliver friendly and excellent assistance at the point of question or before.

**5-10 YEAR PLANNING HORIZON**  
**~ ASSUMPTIONS ABOUT THE**  
**RELEVANT FUTURE ~**

*In order to make progress toward the 10-15 year Envisioned Future, an organization must constantly anticipate the strategic factors likely to affect its ability to succeed, and to assess the implications of those factors. This process of building foresight about the future assists the Santa Clara County Library to recalibrate its view of the relevant future and provide a basis upon which to update the strategic plan. The annual review of these statements will be an important method of ensuring the ongoing relevance of the strategic plan.*

**Social Values and Demographics**

1. There will be more retirees in the county expecting targeted services.
2. The expectation for self-service will continue.
3. The focus on the environment and “going green” will grow significantly.
4. There will be growth in the immigrant population in Santa Clara County.
5. There will be an increased focus on having personal contact with other users inside the library.
6. The number of library users will continue to grow.
7. The county’s population will have modest growth.
8. The cost of living will continue to rise.
9. There will be a greater expectation for remote and interactive services.
10. The population will get older.
11. Patrons will expect different services from the library.
12. The number of people with wireless access will grow.
13. There will be greater expectation for the delivery of services directly to the home.
14. Users will increasingly require assistance with disabilities (hearing, vision, etc.).
15. The population will become more ethnically diverse within the county.
16. The libraries within the county will increasingly serve different demographics (age, ethnicity, values, economic, etc.).
17. There will be a continued expectation for access to free programs.
18. Time pressures and the challenge of balancing work and leisure will continue to drive consumer decisions.
19. Consumers will increasingly expect to receive services faster and easier.
20. The Indo-Asian community will continue to grow within the county.
21. Young males will continue to view the library as irrelevant for their personal use.
22. How people define community will be different.
23. The number of blended families will remain at the same level.
24. The gap between the rich and poor will continue to widen.
25. As the population ages, people will have more leisure time and hours to volunteer, but they may or may not remain in Santa Clara County.
26. There will be a greater expectation for services in multiple languages.
27. Retirees will increasingly live in retirement communities or may leave area.
28. There will be a greater need for affordable housing within the county.
29. The complexity of needs within the school-age population will continue.
30. There will be greater expectation for information access by schools.
31. National school standards will increase expectations.

32. There will be greater demand for cultural celebrations.
33. Younger people will expect different communication tools.

### **Global Business and Economic Factors**

1. The expectation for 24/7 access to services will continue to grow.
2. The number of small businesses/start-ups will continue to grow.
3. Economic cycles will continue to impact the public's perception of the value of libraries.
4. Outsourcing jobs overseas will continue to grow.
5. Library usage will be affected by economic cycles.
6. Energy costs will continue to rise.
7. There will be greater usage of e-payments to pay for services.
8. Biotech companies will continue to grow within Santa Clara County.
9. There will be greater interest in government jobs due to the need for job security and benefits.
10. There will be greater pressure on businesses to be environmentally conscious.
11. There will be greater competition for contributions from the business community.

### **Technology and Science**

1. Information technology will continue to change at a rapid pace.
2. Silicon Valley will continue to be a leader in science and technology.
3. The "technology gap" between the "haves" and "have nots" will continue.
4. The gap between sophisticated technology usage and basic technology usage will continue.
5. The generation that is immersed in technology will be coming of age.
6. There will be an increase in remote access and mobile technologies.
7. Information formats will continue to change at a rapid pace.
8. Patrons will question the security of their library usage records.
9. Staff training in new technologies will be essential.
10. Funding of technology will continue to be a challenge.
11. Technology will continue to change job responsibilities and requirements.
12. Identifying and using alternative energy sources will increase.
13. Virtual social networking will continue to grow.
14. Access to global information will increase.
15. Changes in technology will challenge existing policies.
16. There will be an increased need for free and current scientific and technology information.

### **Competition**

1. Competitors of traditional library services will continue grow (the Internet, bookstores, other libraries, etc.).
2. Individual-based consumerism (ex. Netflix) will increasingly challenge libraries.
3. There will be a greater need to communicate to the public about the value of libraries versus other sources of services.
4. Competition will increase from remote and virtual providers.
5. Competition will increasingly expand globally.
6. There will be an increase in downloadable materials available from multiple sources.
7. There will be growing tension and blurring between free services versus services provided for a fee.

8. There will be greater competition for government funding among community-based services.

### **Legislation and Regulation**

1. Challenges related to library Federal, state, and local funding will continue.
2. There may be a need to measure value to justify budgets.
3. Immigration laws may change causing shifts/changes in populations within the county.
4. Information and privacy rights will continue to be challenged.
5. The state of the economy will continue to affect the public's support of bond issues for new library construction and renovations and operations funding.
6. Digital rights management will continue to be a challenge.
7. Legislative priorities will continue to change as a result of Federal, state and local elections.
8. Librarians will continue to monitor the Patriot Act and other legislative initiatives affecting information privacy.
9. The library will need to return to the voters for library funding.
10. There will be legislation passed limiting information access for children.
11. Non-credentialed librarians will continue to be the norm in public schools.

## **Major Planning Activities**

All Library Staff Meeting ▪ 230 Employees ▪	May	2006
Customer Satisfaction Survey (Gene Bregman) ▪ 700 Respondents ▪	June	2006
County Librarian Forms Strategic Planning Task ▪ 9 Members Meeting Monthly ▪	September	2006
JPA Forms Strategic Planning Sub-Committee ▪ 2 JPA Board Members ▪	October	2006
Contract Awarded to Tecker Consultants ▪ Paul D. Meyer, CAE ▪	June	2007
Consultant Process Design Session with Task Force ▪ 10 Managers ▪	October	2007
Consultant Meetings with Library Staff ▪ 200 Employees, 5 Sessions	November	2007
Friends and Commissioners Forum ▪ 45 Participants ▪	January	2008
Consultant 2-Day Workshop with Committee ▪ 20 Participants ▪	February	2008
Stakeholder Telephone Research Interviews ▪ 21 30-40 Minute Interviews Conducted ▪	February	2008
Consultant Report on Results of Research	February	2008
Consultant Report of Strategic Program/ Service Assessment	March	2008
Consultant 2-Day Workshop with Committee ▪ 20 Participants ▪	April	2008
Consultant Workshop with Managers/Committee ▪ 40 Participants ▪	April	2008
Online Survey of Library Staff ▪ 134 Completed Responses ▪	April	2008

Follow-up Online Survey of Library Staff <ul style="list-style-type: none"> <li>▪ 67 Completed Responses</li> <li>▪</li> </ul>	May	2008
Consultant Report of Draft Strategic Plan to Task Force	May	2008
Consultant Workshop at All Library Staff Meeting <ul style="list-style-type: none"> <li>▪ 225 Employees</li> <li>▪</li> </ul>	May	2008
Consultant Workshop on Strategic Plan Implementation with Managers/Committee <ul style="list-style-type: none"> <li>▪ 40 Participants</li> <li>▪</li> </ul>	June	2008
Consultant Presentation of Final Strategic Plan to JPA	June	2008



### **About Paul D. Meyer, CAE**

Paul D. Meyer, CAE, is a Principal Partner with Tecker Consultants, LLC, and is Principal Consultant with Thunderbolt Thinking, Inc. providing strategy development and change management consulting, issue resolution facilitation, innovation training, operational analysis, board development, and research for corporations and not-for-profit organizations.

### **Consulting Experience**

Paul has worked with trade and professional associations, libraries, academic institutions and corporations worldwide as well as state, regional, and local component organizations and community-based institutions representing a variety of industries, professions and causes. He has worked with groups in a number of settings, but with focused work and expertise in academic universities, libraries, medical organizations, manufacturing and state/local governments. His primary areas of expertise include strategic planning facilitation and implementation, knowledge-based decision-making, conflict facilitation and mediation, brand positioning, operational analysis, structural reengineering and marketing research. He is a proven researcher, trainer, and group process facilitator focused on producing results through collaboration, group dialogue, decision-making processes, and research assessment. Mr. Meyer's skills and experience enables him to assist groups at reaching consensus in developing new opportunities, creating innovative solutions, solving problems, and achieving identified organizational goals.

### **Corporate/E-commerce Experience**

Paul provided Business Development expertise in creating and managing an Internet e-commerce company. He was involved in the initial start-up and successful launch of a multi-million dollar Internet-based provider of insurance services. Through this experience, Paul gained significant expertise in e-commerce strategy and web-based product development.

### **Not-For-Profit Experience**

With over 15 years of experience in managing not-for-profit organizations, Paul brings a wealth of knowledge and innovative thinking to his consulting engagements. He has held a variety of positions within organizations developing expertise in organizational strategy, governance, revenue creation, insurance products, market research, e-commerce, alliance building, marketing, public relations, knowledge management, branding, chapter relations, membership, leadership training, customer service, international expansion, and new product development.

## **Education and Professional Involvements**

Paul has an MBA from Marymount University and has earned his Certified Association Executive (CAE) designation from the American Society of Association Executives (ASAE) and the Center for Association Leadership. He is an active member of ASAE and the Center serving on committees, contributing to publications, and speaking at conferences. Paul is a faculty member of the US Chamber of Commerce's Institute for Organizational Management.

Paul has published articles and led workshops on such topics as strategic planning, library science, brand positioning, action planning, marketing, leadership training, market research, new product development, e-commerce, membership, non-dues revenue, customer service, and organizational strategy. He is co-author of the ASAE best-selling book on organizational change and strategy, *The Will to Govern Well: Knowledge, Trust, and Nimbleness*.

## **Research Bibliography**

**Qualitative Telephone Interviews:** Telephone interviewees represented several important stakeholder groups including patrons representing community libraries, county officials, and nonusers. A questionnaire prepared by Tecker Consultants guided the discussions. Interviews included asking specific questions outlined in the questionnaire along with extemporaneous conversations as a result of issues raised by participants. Some additional questions were added to the questionnaire as participants surfaced new issues. Each interview lasted 30 - 40 minutes. The interviews were conducted by Paul D. Meyer, CAE, Principal Partner, Tecker Consultants and primary consultant to SCCL on their strategic thinking and planning initiative. A report aggregating the data was created.

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