San Mateo County Libraries

Agenda Item IV.

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| To: | JPA Governing Board |
| From: | Anne-Marie Despain, Director of Library Services |
| | Carine Risley, Deputy Director of Library Services |
| Date: | February 3, 2021 |
| Meeting: | February 8, 2021 |
| Re: | 2015-2020 Strategic Plan Review |

## Background

In FY 2013-14 and FY 2014-15, the Governing Board approved efforts to develop a strategic plan. As part of those efforts, staff worked with EMC Research to complete a study to identify the demographic characteristics, behaviors, and values of library users and non-users in order to better understand and tailor library services to community needs. The report was used to effectively allocate resources, strengthen our relevance to the community, and create focus for future planning efforts, including the development of a new Strategic Plan.

To build on EMC Research's findings and solidify the development of a strategic plan that would serve as a powerful guide to the organization, San Mateo County Libraries embarked on a strategic planning process to define and shape the Library's evolving role in our communities over the next five years. The resulting nine-month long process was inclusive and robust, and included the input of over 7,500 community members, volunteers, Friends, and staff. The resulting plan was not only visionary and directional, but also flexible enough to respond to environmental changes and unforeseen circumstance.

In FY 2020-21, the Governing Board approved an initiative to develop a new Strategic Plan to replace the current plan which was set to expire in 2020. Staff again worked with EMC, to mirror the previous approach, and the results were presented to the Governing Board on September 21, 2020. Additionally, staff recommended the extension of the current Strategic Plan due to COVID-19 and the difficulty of community engagement efforts. The Board accepted the report and directed staff to provide a review of our Strategic Plan for current Governing Board members.

## Discussion

The 2015 strategic planning process consisted of three phases: information gathering, plan development, and implementation. Emphasis was placed on securing input from a broad cross-section of internal and external stakeholders representing Governing Board and Operations Committee members, library patrons, staff, residents, and supporters.

The first phase included soliciting feedback from key stakeholder groups through carefully conceived surveys and community outreach, meetings and focus groups, and data integration and analysis.

Staff worked to design an outward facing process focused on community engagement. Over 7,500 community members, volunteers, Friends, and staff provided input. Survey questions were designed to identify current use and awareness of services, as well as to understand what matters to our communities.

The second phase synthesized insights from key findings to create a vision, mission, and overall strategy for the plan.

The final phase of the strategic planning process culminated in the presentation of the key findings and recommendation of new vision and mission statements and a new set of strategic goals to the Library JPA Governing Board.

Mission and vision statements establish the guiding principles to shape San Mateo County Libraries' future and serve as the foundation for the 2015 – 2020 Strategic Plan. The three strategic goals describe what the organization seeks to accomplish over the course of this plan. These goals provide a framework for determining what will qualify as success, and what long-term outcomes the Library hopes to achieve based on the wide array of broad-based input that was used to establish this plan.

**Vision:**

San Mateo County Libraries ignites growth through transformative experiences.

**Mission:**

San Mateo County Libraries strengthens our community by creating an inclusive sense of place and an environment for learning.

**Our Goals:**

We cultivate an active presence and create spaces that support discovery, enrich lives and uplift the community.

This means that we will:

- Build and update facilities to create inviting and flexible spaces
- Spot opportunities to deliver services beyond buildings
- Deliver an easily accessible and rich online experience

We are leaders in establishing a foundation for early literacy and supporting exploration and growth at every stage of life.

This means that we will:

- Engage children and families in high quality, research-based learning experiences
- Bridge the digital divide by building skills and providing access to technology
- Develop creative programs and services that have measurable results
- Grow a culture of learning and participation

We understand needs and promote meaningful library services as solutions.

This means that we will:

- Understand and align with community goals
- Communicate an inspiring vision and the library's story of impact
- Cultivate library champions who reflect the dynamic environment
- Employ resources in new ways to ensure equitable access

Working with EMC in FY 2020-21, to mirror the previous approach, new surveys were designed to cover a similar set of topics as the 2014 study. They were also updated to reflect changes since that study was completed, both in terms of the new San Mateo County Libraries' branding as well as new programs, services, and library offerings.

Results of the Resident and Library Patron Surveys were presented to the JPA in September and included the following highlights:

<u>Resident Survey</u>

- San Mateo County Libraries are well-liked by the community and have a strong favorable rating.
- While residents report using the library less due to the pandemic, the majority of residents say they will return to visiting the library by the winter.
- Residents rate most service components as being important, but the highest ranked fall into two categories: borrowed materials and educational resources for the community.
- Descriptors and messaging about the library are well-received.
- The language used to describe SMCL was very effective, suggesting there are potentially multiple ways to tell a positive story about the libraries and the role San Mateo County Libraries play in the local community. Given the very high trust and favorability ratings, San Mateo County Libraries has a voice that the vast majority of local residents will listen to.

- The research suggests that people continue to view book lending (physical or online) as the core library function. That's not to say we should not continue to pursue other services and functions, but we should not lose sight of the importance of the core function of book lending.

Patron Survey

- San Mateo County Libraries continues to enjoy strong positive ratings from its patrons regarding its job performance and services.
- Patrons report using the system less due to the pandemic, although digital resources are proving to be important and well-rated.
- Patrons specifically highlight San Mateo County Libraries staff and convenience as some of the system's strengths.
- Traditional library services, like checking out materials (physical and digital) and computer/wi-fi access, are rated as the most important.
- Patrons are concerned about COVID, and many say they will not return to using library facilities until there is a vaccine or the virus is contained.

Overall, San Mateo County Libraries are receiving performance ratings of equal or greater than those seen in 2014.

Based on our strong, positive survey results, staff is recommending that the Strategic Plan be extended to 2025. The current vision, mission, and strategic goals are as relevant today as when originally written; they continue to provide a bold framework for determining priorities and providing guiding principles for the future.

The flexibility of the Strategic Plan has been instrumental in navigating the highly variable environment of the COVID-19 pandemic. Our resources are currently focused on modulating library services to changing conditions and fluid community member needs. Gradual restoration of library services when appropriate and determining a new normal for operations will be a priority. Using the information collected and analyzed in the EMC study and integrating learned agility from our pandemic services, staff propose to make minor adjustments and refresh the Strategic Plan for approval in FY 2021-22.

## Fiscal Impact

There is no fiscal impact associated with approving this item.

## Recommendation

Recommend Library JPA Governing Board accept the 2015-2020 Strategic Plan Review and approve extension of the Strategic Plan to 2025. Operations Committee members present at the February 2, 2021, meeting concurred with this recommendation.