



Staff Report

July 10, 2018

TO: Honorable Mayor and Members of the Town Council
FROM: Sean Rabé, Town Manager
DATE: June 28, 2018
RE: Approval of Library Strategic Planning Contract

Recommendation

Staff recommends the Council authorize the Town Manager to enter into a contract with Jennifer Sweeney & Associates, LLC, for strategic planning services for the Loomis Library and Community Learning Center.

Issue Statement and Discussion

As the Council knows, Placer County made the decision to close the Loomis Branch of the Placer County Library system in 2015. The community rallied behind the library at the 2016 General Election, passing a quarter-cent sales tax increase (Measure F) to help fund the library's operations with 60 percent approval. Measure F was a general use sales tax increase, meaning that it required only 50-percent-plus-one voter approval to pass. The community also passed Measure G with 64 percent voter approval. Measure G was an advisory companion measure, that advised how the proceeds of Measure F would be spent. Measure F asked voters whether or not the general use tax would be enacted, "To support the continued operation of the Loomis library, and for other general fund purposes, shall a quarter percent transactions and use tax (sales tax) raising approximately \$250,000 annually be adopted for a period of ten years, subject to annual audits?"

Once those two ballot measures were approved, the Town took several steps to ensure the continual operation of the Library, including the initial Memorandum of Understanding (MOU) with the Friends of the Library, Loomis (and several subsequent extensions). This MOU was in place through August 2017, when Council approved a one-year formal contract with the Friends for the operation of the library. That formal contract (which was recently extended by the Council for an additional year) provided the mechanism for the Friends to hire the Community Engagement Librarian in January of this year.

This flurry of activity was required to make sure the library continued to stay open and functional. The Library Board has not had an opportunity to sit down and discuss what the primary mission, focus and guiding principles of the library should be, however. The focus and energy was put into simply keeping the doors open. It is timely now for the Library Board to take a step back and create the underlying principles and focus for the future of the library through strategic planning process.

A subcommittee of the Library Board and Advisory Committee reached out to three strategic planning consultants. After interviews and reviewing the proposals, the subcommittee unanimously recommended Jennifer Sweeney and Associates. The Library Board recently ratified that recommendation.

Because the Library Board cannot enter into contracts for services on its own, the Town must contract with the consultant. Staff recommends Council authorize the Town Manager to enter into a contract with the Library Board's recommended strategic planning consultant, Jennifer Sweeney & Associates, LLC.

CEQA Requirements

There are no CEQA requirements associated with the recommended action.

Financial and/or Policy Implications

The proposed fee for the strategic planning process is \$17,300. The Fiscal Year 2018-19 budget includes \$25,000 for this work.

Attachments

- A. Jennifer Sweeney & Associates, LLC proposal

**PROPOSAL TO PROVIDE STRATEGIC PLANNING SERVICES
TO THE LOOMIS LIBRARY & COMMUNITY LEARNING CENTER**

May 22, 2018

Jennifer Sweeney & Associates LLC is pleased to present the following proposal to provide strategic planning assistance to the Loomis Library & Community Learning Center. Specifics of the proposed work are presented below.

PROJECT WORK PLAN & TIMELINE

Task 1: Agree on the strategic planning process. We will facilitate an initial “kick off” meeting with the strategic planning team, library staff, and any others desired by Loomis Library to clarify the overall purpose and intended outcomes of the strategic planning process, to understand Loomis Library’s specific concerns, to identify stakeholders, and to establish agreement on the nature and specific schedule of the tasks to be accomplished. Early coordination on the details of the process is critical. The deliverable for this task will be a memo documenting observations and recommendations ensuing from the meeting.

Task 2: Clarify mission & vision. We will facilitate a meeting with the strategic planning team and others as desired by Loomis Library to clarify the library’s core guiding principles, working from data already developed at the recent library planning retreat. It is important to establish the mission and values first to provide a foundation for the subsequent planning work.

Task 3. Compile library trends, benchmarks, and governance policies. We will compile data from Loomis Library on local library operations and comparison with benchmark libraries to provide a clear picture of the past, current, and projected environments. Data on regional demographic and economic conditions will also be collected from a variety of outside sources (US Census, SACOG, Placer County, etc.). We will also collect examples of governance policies and guidance regarding duties of public library boards, focusing on smaller, rural libraries and startups that are similar to Loomis Library if possible.

Task 4: Conduct community survey. We will conduct a survey in online and paper format in order to collect information from as many individual community members as possible. The data collection will focus on themes as desired by Loomis Library, but possibly including aspects of local community market analysis and behaviors; library collections, services and programs; and specific library roles such as community learning, encouraging reading, early childhood literacy, and workforce development. Working with Loomis Library, we will identify key stakeholder groups such as library users and nonusers, Friends, elected officials, community partners, and/or others as desired by the Loomis Library. We will work carefully with Loomis Library to determine how best to engage with these community members.

Task 5: Facilitate community forum. We will conduct one community forum with representatives from key stakeholder groups, including town council and local agencies, local businesses and entrepreneurs, Library Board, Library Friends and volunteers, educators, community groups, seniors, youth, and others as desired by Loomis Library. The forum is a crucial place for engaging knowledgeable constituents who can articulate the future vision of Loomis Public as a dynamic and vital community, and relate this to

opportunities for the library. We will work with Loomis Library to identify, select, and invite informed, dedicated participants. Our design for these forums will include activities and questions to stimulate focused, creative thinking in a collaborative environment.

Task 6: Interview key stakeholders. We will work closely with Loomis Library to conduct interviews with appropriate stakeholders who can provide focused insight into community goals and priorities. The intention is to reach key community leaders who cannot attend the community forum or planning workshop but whose input is critical for the plan. Approximately four interviews will be conducted.

Task 7. Facilitate strategic planning workshop (SWOT analysis). We will facilitate a strategic planning workshop with the strategic planning team (and others as desired). This organizational assessment will determine direction and steps for building organizational capacity. The product of this workshop will be a set of prioritized issues, goals and specific actions needed aligned with a timeline.

Task 8: Develop draft strategic planning report. We will formulate a plan for Loomis Library based on the data collected from stakeholders in the survey, interviews, and community forum, and the visioning and strategic planning workshops. The plan will provide a new or revised library mission statement, values statement, and prioritized issues, goals, and specific actions needed, at the level of detail Loomis Library desires.

Key deliverable documents

- Library demographic profile, use patterns, trends, and projections; economic and demographic data profile of the library service area
- Example governance policies and guidance documents
- Summaries of survey, interviews, and community forum
- Documentation of all substantive actions and decisions derived out of meetings
- Draft five-year functional strategic plan document including mission and values statements, service goals, and objectives, and activities.
- Self-assessment template for periodic review and evaluation of strategic goals.

Timeline

The work could be done within the following general timeline:

Task/Milestone	June	July	Aug
Task 1: Agree on the strategic planning process	X		
Task 2: Facilitate mission & visioning meeting	X		
Task 3: Compile library data	X		
Task 4: Conduct community survey		X	
Task 5: Facilitate community forum		X	
Task 6: Interview stakeholders		X	
Task 7: Facilitate strategic planning workshop			X
Task 8. Prepare draft plan			X

COST PROPOSAL

This cost estimate is based on completion of the tasks listed in the work plan in this proposal:

TASK	DESCRIPTION	HOURS (\$175)	COST
1. Agree on strategic planning process	Prepare & lead meeting	4	\$ 700
2. Facilitate mission & vision meeting	Conduct meeting, compile findings	8	\$ 1,400
3. Compile data & policies	Estimate trends and benchmarks	16	\$ 2,800
4. Conduct community survey	Design, conduct, analyze	16	\$ 2,800
5. Facilitate community forum	Prepare & conduct, report findings	16	\$ 2,800
6. Interview stakeholders (4)	Design, conduct, analyze	4	\$ 700
7. Facilitate strategic planning workshop	Conduct workshop, compile findings	16	\$ 2,800
8. Prepare plan	Draft strategic plan	16	\$ 2,800
	Labor total	96	\$ 16,800
EXPENSES	Misc supplies		\$ 500
	GRAND TOTAL	96	\$ 17,300

QUALIFICATIONS

Jennifer K. Sweeney & Associates, LLC

- Woman-owned small business established in 2011 to provide program evaluation, planning, and training services to libraries.
- 18 years of experience as professional librarian and over 18 years of experience in program evaluation and planning.
- Experienced workshop facilitator and university instructor in library evaluation and planning.
- Relevant planning projects: Strategic Planning for Menlo Park Library and Monrovia Public Library; Facilities Master Planning for Woodland Public Library and Yolo County Public Library; Resource Sharing Needs Assessment for the Idaho Commission for Libraries; Needs Assessment and Visioning for the Community Water Center; Five Year LSTA Evaluation for the Nevada State Library & Archives; Strategic Planning for Child's Voice; Administrative Unit Reviews for the University of California Davis Libraries.
- Lecturer, Information School, San Jose State University and Simmons College.
- Course developer and instructor, InfoPeople and Library Juice Academy.
- MS, Library Science, Catholic University; PhD, Information Studies, UCLA.

Jennifer K. Sweeney, MSLS, PhD brings a solid foundation of career experience as a librarian and planning evaluation professional, with close knowledge of public library environments. Dr. Sweeney spent 18 years as a librarian in academic, school, and special libraries before leading numerous library planning and assessment projects, including strategic planning for the City of Menlo Park Library and the Monrovia Public Library; facilities master planning for the Yolo County Library and Woodland Public Library; the Five-Year LSTA evaluation for the state of Nevada, reading program evaluations in California public libraries, and evaluations of library services and operations in public and academic libraries. Her experience as a professional evaluator extends over 19 years, and includes projects with state government agencies, the University of California Davis, the California Center for the Book, and numerous nonprofit organizations in the social services sector.

In partnership with Smith & Lehmann Consulting, Dr. Sweeney conducted an extensive visioning and needs assessment project for the Community Water Center, clarifying CWC's mission and vision and developing a functional strategic plan to guide the organization's development over the next five years. Dr. Sweeney's research has included numerous studies on library program impact and quality, particularly educational program impacts on minority and disadvantaged populations. She was the 2010 recipient of the American Library Association Diversity Research Grant, awarded to support a national study of library services to juveniles in detention. She is a skilled interviewer, group facilitator, survey designer, and data analyst. Dr. Sweeney currently teaches courses in management planning, program evaluation and information services foundations in the MLIS programs at the Information School, San Jose State University, the College of Computing and Informatics at Drexel University, and the School of Library and Information Science at Simmons College.

PROFESSIONAL REFERENCES

Name	Contact	Project
Carey Vance <i>Library Manager</i> <i>Monrovia Public Library</i>	(626) 256-8229 cvance@ci.monrovia.ca.us	Monrovia Public Library Strategic Planning (2017)
Susan Holmer <i>Director of Library Services</i> <i>Menlo Park Library</i>	(650) 330-2510 seholmer@menlopark.org	Menlo Park Library Strategic Planning (2015)
Scott Love <i>Library Regional Manager</i> <i>Yolo County Library</i>	(530) 757-5595 Scott.love@yolocounty.org	Yolo County Library Facilities Master Planning (2017)

APPENDIX: RESUME

JENNIFER K. SWEENEY

Jennifer K. Sweeney & Associates, LLC
4896 Steele Way
Fair Oaks, CA 95628
(916) 718-9442
jksweeney572@gmail.com

SUMMARY

- Experienced evaluation and planning project manager for public and nonprofit organizations, specializing in libraries and education programs. Knowledgeable in program and organizational development, strategic planning, outcomes measurement, performance monitoring, conflict analysis, logic modeling, communication and collaboration, and needs assessment.
- Experienced in survey methods and experimental research designs using regression and chi-square analysis; specialist in qualitative methods and case studies; highly skilled interviewer and meeting/focus group facilitator. Certified in Technology of Participation™ and The Leadership Challenge™ facilitation methods.
- Experienced instructor in evaluation research methods and library science fundamentals.

EDUCATION

PhD, Library and Information Studies. University of California, Los Angeles
MS, Library and Information Science. Catholic University, Washington, DC
BA, English. Stony Brook University (New York)

WORK HISTORY

- Jennifer K. Sweeney & Associates, LLC. Established 2011. Principal and owner.
- San Jose State University, School of Information (2017- present). Lecturer. Program evaluation research methods.
- Simmons College School of Library and Information Science (2016- present). Lecturer. Information sources and services.
- Drexel University, College of Computing & Informatics and Goodwin College of Education (2009 – present). Adjunct faculty. Courses: user services, research methods, information literacy curriculum design, competitive intelligence. Member of curriculum redesign committee.
- Smith & Lehmann Consulting, Inc., Davis, CA (2009- present). Analyst. www.smithlehmann.org
- [Infopeople](#). Course designer & instructor. (2011- present).
- [Library Juice Academy](#). Course designer & instructor (2014 – present).
- University of California, Davis School of Education (2006 – 2009): Center for Education and Evaluation Services, Cooperative Research and Extension Services to Schools (CRESS); National

Institutes of Health (NIH) Minority Opportunities in Research and Education (MORE) Program. Analyst.

- California Library Association (2006 – 2007). Consultant.
- California Center for the Book (UCLA) (2003 - 2006). Consultant.
- UCLA Department of Information Studies (2003 – 2004). Research associate.
- University of California, Davis University Library (1998 – 2002). Analyst.
- American University Library, Washington, DC (1989 – 1997). Reference librarian.
- Cost Engineering Research, Inc., Arlington, VA (1982 – 1989). Librarian/data manager, technical writer.

SELECTED PROJECTS

Get Involved! A Multi-State Cooperative Volunteer Engagement Training for Libraries. Designed and conducted program evaluation for a comprehensive training program to help libraries recruit and manage skilled volunteers. Client served: California State Library.

Library Strategic Planning for Menlo Park Library; Monrovia Public Library. In partnership with Patchett & Associates, designed and conducted a strategic planning process, including needs assessment; mission, vision and values statements; SWOT workshops and community forums; and community survey. Clients served: Menlo Park Library; Monrovia Public Library. *Project director.*

Facilities Master Planning for Yolo County Public Library. In partnership with Janice Flug, designed and conducted a facilities master planning process, including needs assessment; SWOT workshops and community forums; and community survey. *Project director.*

Facilities Master Planning for Woodland Public Library. In partnership with Noll & Tam Architects, provided data analysis support for a facilities master planning process, including community needs assessment, population and economic projections, and community survey.

Strategic Planning for Child's Voice. Developed new collaborative strategic planning approach for a premier listening and spoken language services program for children with hearing impairment. Utilized unique planning process with input from broad stakeholder base, using a combined goals-based and impact mapping planning design. Program elements include speaking and listening rehabilitation services, audiological management, speech therapy, diagnostics and treatment, and mainstream support.

Resource Sharing Needs Assessment for the Idaho Commission for Libraries. Investigated interlibrary loan activity across public, academic, and K-16 libraries; assessed progress toward statewide resource sharing goals and networking action plans. *Project director.*

Visioning and Needs assessment for Community Water Center – Smith & Lehmann Consulting. Facilitated assessment of nonprofit community organization's mission, vision, and organizational structure, and developed five-year strategic plan. Conducted situational analysis, facilitated planning retreats, and conducted staffing analysis.

Association of State and Territorial Health Officials (ASTHO): Interagency Coordination of Federal Newborn Hearing Screening Programs – Smith & Lehmann Consulting. Designed and conducted a case study of interagency collaboration and communication across multiple Federal and state public health agencies and non-governmental organizations to identify aspects of successful collaboration.

Five-year Evaluation of LSTA Programs for the Nevada State Library & Archives. Investigated program performance and outcomes of Institute of Museum and Library Services grants to libraries administered under the Library Services & Technology Act (LSTA) program in Nevada. Areas of focus included Statewide Reading Programs, Nevada Digital Initiative, Talking Books Recording and Operations, Databases, and the competitive grant award process. *Project director.*

University Library Administrative Unit Reviews – University of California, Davis. Project leader for evaluation of public services, interlibrary loan, health sciences library services, and safety and security. *Project director.*

State of Library Evaluation in California. Surveyed public and academic libraries on evaluation practices, problems, and training needs. *Project director.*

Reading Program Evaluations – California Library Association; California Center for the Book. Assessed usefulness and quality of statewide reading program materials and websites, librarian satisfaction with materials, and perceptions of cost effectiveness. Designed and conducted surveys, focus groups, and interviews. *Project director.*

National Institutes of Health (NIH) Minority Opportunities in Research (MORE) Biology Undergraduate Scholars Program Evaluation – University of California, Davis School of Education. Evaluated an educational enrichment program for underrepresented minority students in the sciences through statistical studies, alumni surveys, and interviews.

State of Nevada Energy Assistance Program/Weatherization Assistance Program - Smith & Lehmann Consulting. Designed and conducted a multi-year process and outcomes evaluation of two programs funded by the Universal Energy Charge and implemented by state welfare and housing divisions. Created logic models of program operations, resources, and outcomes, and combined these models with state annual planning data to identify performance indicators, measure program impact and the scope of statewide need, and identify program response to changing economic conditions.

Library Services to Juveniles in Detention. Investigated breadth of library services and needs in juvenile detention centers and correctional facilities in the United States. Interviewed service providers, conducted site visits, and implemented national survey. Recipient of American Library Association Diversity Research Grant 2010. *Project director.*

COURSES AND WEBINARS

San Jose State University Information School

INFO 285 Applied Research Methods: Evaluating Programs & Services

Simmons College School of Library & Information Sciences

LIS 407 Information Sources & Services

Drexel University College of Computing and Informatics/Goodwin College of Education

INFO 515 Research in Information Organizations
INFO 678 Competitive Intelligence
INFO 684 Resources for Young Adults
INFO 688 Instructional Role of the Information Professional
EDHE 714 Introduction to Research

Infopeople

Practical Project Management for Librarians
Library Evaluation for Grant Writers and Others
Estimating Library Costs and Benefits
Creating Effective Surveys

Library Juice Academy

Introduction to Program Evaluation
Evaluating Service Quality and Patron Satisfaction
Easy Patron Surveys
Getting to Know Your Users through Interviews and Focus Groups
Everyday Statistics for Librarians

Other

California Library Association Annual Conference 2017: Preconference – Beyond the Numbers:
Using Data for Your Library's Present & Future

SELECTED PUBLICATIONS AND PRESENTATIONS

Sweeney, J. (in process). Program Evaluation in 21st Century Public Libraries:
New Methods and Applications. Manuscript contract in negotiation.

Sweeney, J. and Ray Patchett (2016). Strategic Plan for the Menlo Park Library. Prepared for the Menlo Park Library, Menlo Park, CA.

Sweeney, J. and Janice Flug (2015). Resource Sharing Needs Assessment for the Idaho Commission for Libraries. Prepared for the Idaho Commission for Libraries, Boise, ID.

Sweeney, J., S. Maack, A. Hopkins (2012). Nevada State Library & Archives Library Services & Technology Act Five Year Evaluation Report. Prepared for Nevada State Library & Archives, Carson City, NV.

Sweeney, J. Erika Lehmann, and John Smith (2010). Situational Analysis for the Community Water Center. Prepared with Smith & Lehmann Consulting for the Community Water Center, Fresno, CA.

Sweeney, J. Erika Lehmann, and John Smith (2009). Organizational Effectiveness Evaluation. Prepared with Smith & Lehmann Consulting for the Environmental Justice Coalition for Water, Sacramento, CA.

Sweeney, J. (2015). Identity, Administration and Inclusion: Status of Contingent Faculty in Library & Information Studies. ALISE 2015 Annual Conference, Chicago.

Sweeney, J. and Villarejo, M. (2013). Minority student perceptions of the influence of an academic intervention program on career choice. *Journal of College Student Development*, vol. 54 (5).

Sweeney, J. (2012). Literacy: A way out for at-risk youth. Thousand Oaks, CA: Libraries Unlimited.

Sweeney, J. (2011). Interagency cooperation in juvenile detention center library services: An introduction to the issues. In Williams, D. and Janine Golden (editors), *Advances in Library Administration and Organization*, vol. 30: 187-206.

Sweeney, J. (2010). *The state of library evaluation in California 2010*. Presented to the California Library Association Annual Conference, November 2010.

Sweeney, J. (2008). Transforming the rational perspective on skill development: The Dreyfus Model in library reference work. In Garten, E. et al (editors). *Advances in Library Administration and Organization*, vol. 26: 1-39.

Sweeney, J. (2006). *Reaching out with books: Tomorrow's reading programs in California public libraries*. Research Report 2006. Los Angeles, CA: California Center for the Book.

Sweeney, J. (2004). *Survey on reading promotion programs: What public libraries need for success*. Los Angeles, CA: California Center for the Book. Also presented to the California Library Association Annual Conference, November 2004.

Sweeney, J. (2002). Cost/benefit comparison of print and electronic journals in a university library: A progress report. In Stein, J. et al (eds.), *Proceedings of the 4th Northumbria International Conference on Performance Measurement in Libraries and Information Services*. Washington, DC: Association of Research Libraries. Accessed 4 February 2010 at old.libqual.org/documents/admin/sweeney.pdf

Sweeney, J. (2000). *Administrative unit review: User services in the General Library*. University Library, University of California, Davis. August 2000. Accessed 9 October 2008 at <http://www.lib.ucdavis.edu/ul/about/aur/user-aur-1999-2000.pdf>