

ASSET ALLOCATION – Placentia Library District

	Strategic Range	Policy	Tactical
Equity	50-70%	60%	57.0%
Fixed Income	30-50%	35%	39.25%
Cash	0-20%	5%	3.75%

Current Asset Allocation

Investment Vehicle

Equity			57.00%
Large Cap Core	SMGIX	Columbia Contrarian Core Cl Z	5.50%
	SICWX	Sentinel Common Stock Fd Cl I	5.50%
Large Cap Value	LSGIX	Loomis Sayles Value Fd Cl Y	5.50%
	PRFDX	T. Rowe Price Equity Income Fd	4.50%
Large Cap Growth	HACAX	Harbor Capital Appreciation Fund	6.00%
	PRGFX	T. Rowe Price Growth Stock Fund	6.00%
Mid Cap Value	TIMVX	TIAA-CREF Mid-Cap Value Instl	2.50%
Mid Cap Growth	PNMFX	Highmark Geneva Mid Cap Growth Fund	3.25%
Small Cap Value	NSVAX	Columbia Small Cap Value Fund II	2.50%
Small Cap Growth	PRNHX	T. Rowe Price New Horizons Fund	3.50%
International Core	HIOFX	HighMark International Opportunity Fund	2.50%
International Value	DODFX	Dodge & Cox International Stock Fund	2.50%
International Growth	MQGIX	MFS International Growth Fund	1.75%
Emerging Markets	SEMNX	Schroder Emerg Mkt Equity Inv	3.50%
Real Estate	FARCX	Nuveen Real Estate Secs Fd Cl I	2.00%
Fixed Income			39.25%
Short-Term	VFSUX	Vanguard Short-Term Corp Adm Fund	11.50%
Intermediate-Term	HMBDX	HighMark Bond Fund	13.00%
	PTRRX	PIMCO Total Return Instl Fund	13.00%
High Yield Taxable	PHIYX	PIMCO High Yield Instl Fund	1.75%
Cash			3.75%
	FPZXX	First American Prime Obligations Fund	3.75%
TOTAL			100.00%



Placentia Library District

For Period Ending August 31, 2013

Fund Name	LARGE CAP EQUITY FUNDS						
	1-Month Return	3-Month Return	Year-to-Date	1-Year Return	3-Year Return	5-Year Return	10-Year Return
Columbia Contrarian Core Cl Z	-2.53	1.85	19.17	23.50	20.40	9.29	8.99
T. Rowe Price Equity Income	-3.06	0.37	15.91	21.19	17.23	7.17	7.56
Harbor Capital Appreciation Instl	-0.55	3.88	15.76	17.46	18.60	8.55	7.56
Sentinel Common Stock Fd Cl I	-3.24	1.09	16.24	20.11	17.97	7.36	8.20
Loomis Sayles Value Fund	-2.77	1.67	18.92	25.01	19.06	6.64	9.06
T. Rowe Price Growth Stock	-0.99	3.29	16.44	18.22	19.88	8.64	8.05
S&P 500 Index	-2.90	0.67	16.15	18.70	18.40	7.32	7.12
MID CAP EQUITY FUNDS							
HighMark Geneva Mid Cap Growth	-1.94	4.11	15.60	16.62	18.99	9.21	9.76
Russell Mid Cap Growth Index	-1.90	2.93	19.52	23.97	20.27	9.14	9.42
TIAA-Cref Mid-Cap Value Instl	-3.35	0.89	16.78	22.48	17.84	7.58	10.52
Russell Mid Cap Value Index	-3.50	0.43	18.01	25.37	19.14	8.87	10.37
SMALL CAP EQUITY FUNDS							
Columbia Small Cap Value II Z	-3.58	3.75	21.51	28.84	21.00	8.14	10.29
T. Rowe Price New Horizons	0.05	7.93	28.91	30.60	28.54	15.40	12.12
Russell 2000 Index	-3.18	3.07	20.03	26.27	20.50	7.98	8.76
INTERNATIONAL EQUITY FUNDS							
Dodge & Cox Intl Stock	-2.87	-0.50	8.40	22.29	9.69	3.22	10.01
HighMark Int'l Opportunities Fid	-2.57	-2.17	3.44	15.04	8.05	0.72	8.35
Schroder Emerging Market Equity	-2.62	-6.62	-10.83	0.36	2.32	2.80	-
MFS International Growth I	-1.76	-1.45	3.30	12.84	9.86	4.56	9.53
MSCI EAFE Index	-1.32	0.19	8.15	18.66	9.28	1.62	7.57
REIT EQUITY FUNDS							
Nuveen Real Estate Secs I	-6.69	-7.90	-1.12	-0.22	12.65	6.40	11.17
DJ US Select REIT Index	-6.86	-7.79	-0.84	-0.54	12.54	4.56	9.32
BOND FUNDS							
HighMark Bond Fid	-0.67	-2.26	-2.55	-1.27	3.38	5.81	4.96
Pimco Total Return Instl	-1.07	-3.21	-3.60	-1.60	3.43	6.89	6.23
Vanguard Short-Term Investment-Grade Adm	-0.21	-0.66	-0.26	0.77	2.25	3.84	3.77
BarCap US Aggregate Bond	-0.51	-1.92	-2.81	-2.47	2.58	4.93	4.77
Pimco High Yield Instl	-0.60	-1.31	1.81	6.30	8.49	9.45	7.89
Credit Suisse High Yield Index	-0.58	-1.23	2.94	7.50	9.66	10.66	8.78

Source: SEI Investments, Morningstar Investments

Returns less than one year are not annualized. Past performance is no indication of future results. The information presented has been obtained from sources believed to be accurate and reliable. Securities are not FDIC insured, have no bank guarantee and may lose value.



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A portfolio's Expected Return (comprised of capital appreciation and income/dividends) is calculated in two steps:

(1) The expected return of each asset class in a given portfolio is determined through a combination of examining historical rates of return with expected returns. Historical rates of return (analyzed over a number of years) are provided by Ibbotson Associates. Expected rates of return are developed by HighMark's Asset Allocation Committee, which incorporates a one year forecast for market returns, the asset class' beta, and a risk-free rate (generally, the T-Bill rate).

(2) The expected return for the overall portfolio is derived by taking the weighted average of each respective asset class' expected return. Expected returns generated are before taxes and any fees. The Standard Deviation for an asset class represents its possible divergence of the actual return for an asset class from its Expected Return. It measures the potential magnitude of any positive overperformance or negative underperformance of an asset class from its Expected Return.

Strategies represented are hypothetical portfolios and does not reflect actual investment decisions or recommendations. The strategies do not reflect the liquidity constraints of actual fund investing or the impact that material economic and market factors may have on an investment adviser's decision-making. Investors cannot invest in the hypothetical portfolios and actual investment results may differ materially. The hypothetical portfolios do not reflect the deduction of advisory fees, brokerage, commissions, or any other actual client expenses, which would reduce investor returns. Advisory fees are described in Part II of the Form ADV and are available upon request. The hypothetical portfolios do not reflect the reinvestment of dividends, distributions, and other earnings.

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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

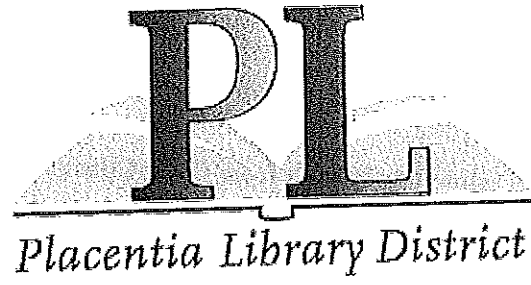
TO: Library Board of Trustees
FROM: Jeanette Contreras, Library Director
SUBJECT: Information Technology Report from Click Consulting
DATE: September 11, 2013

BACKGROUND

Mr. Sam Escamilla from Click Consulting will provide the Library Board of Trustees with an update on the Library's information technology status.

RECOMMENDATION

Action to be determined by the Library Board of Trustees.



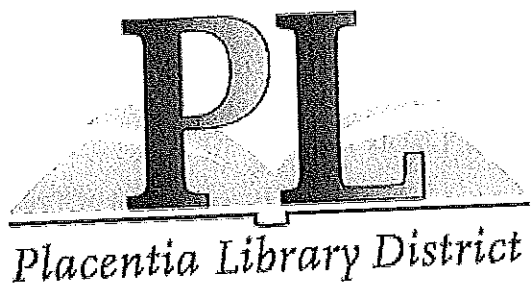
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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees
FROM: Jeanette Contreras, Library Director
SUBJECT: Report on Actions taken at the Library Board of Trustees Closed Session Meeting
DATE: September 11, 2013

BACKGROUND

President Shkoler will report on actions taken by the Library Board of Trustees during the Closed Session Meeting on September 11, 2013.



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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees
FROM: Jeanette Contreras, Library Director
SUBJECT: Award Omar Taha Construction the Fascia Wood Improvement Project
DATE: September 11, 2013

BACKGROUND

At the June 17, 2013 Library Board of Trustees meeting, staff was directed to draft a request for proposal (RFP) to provide improvement to the existing roof trimming fascia boards. The Library received one quote from Omar Taha Construction which was presented to the Library Board of Trustees at the July 15, 2013 meeting.


The Library's fascia boards were replaced approximately 10 years ago. The City of Placentia has completed replacing and repairing the fascia boards. Omar Taha Construction performed this work for the City. Mr. Taha provided a quote of \$15,148 to conduct similar work for the Library.

Attachment A is the quote from Omar Taha Construction.

Fiscal Impact: \$15,000+

RECOMMENDATION

Award Omar Taha Construction to perform fascia wood improvement for the Library.

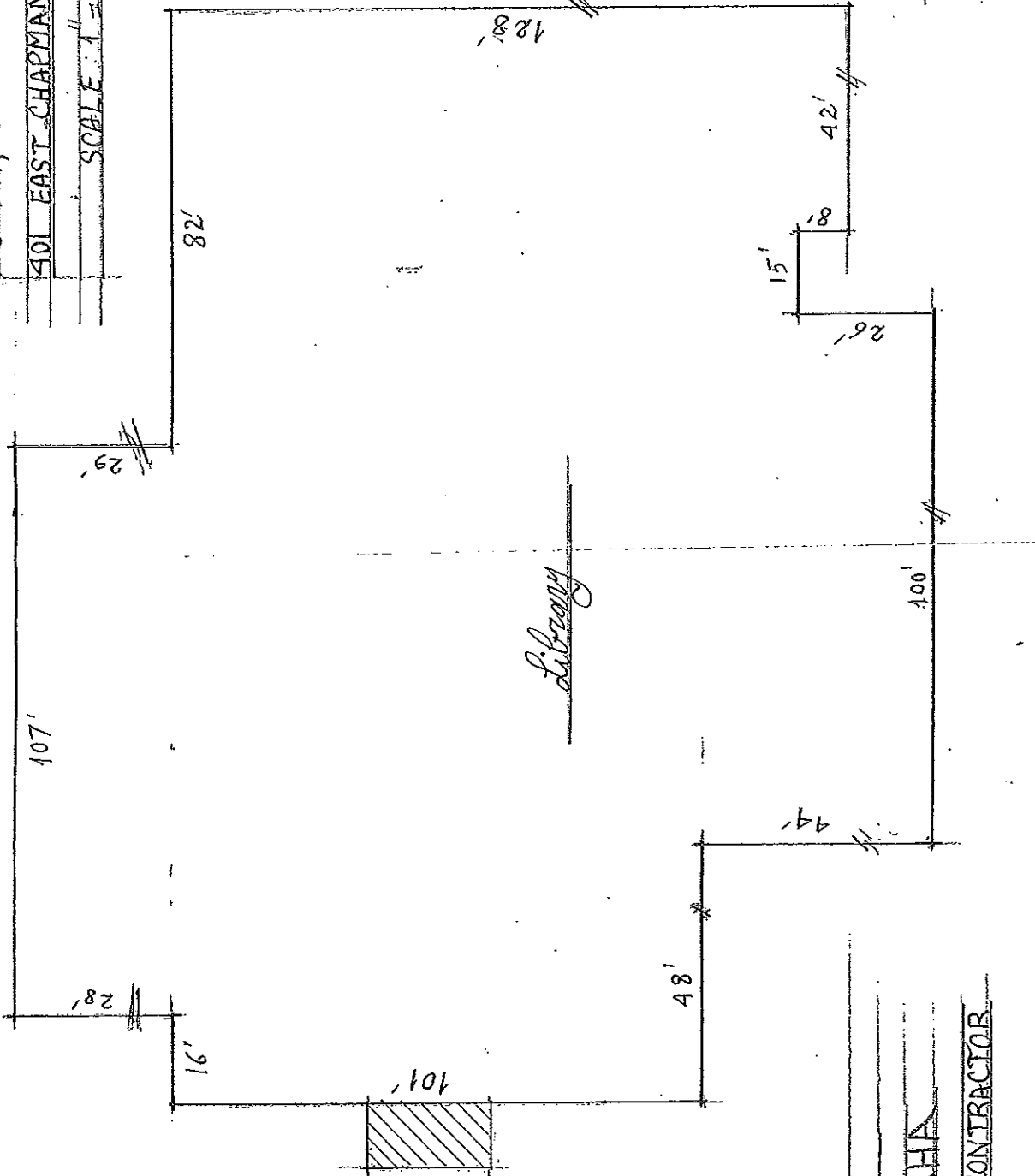

 OMAR TAHA CONSTRUCTION
 LICENSE# 927287
 ARCHITECTURE / CONTRACTOR
 TEL: (626) 378-6005 / FAX: (626) 967-1206

CITY OF PLACENTIA

LIBRARY MASS PLAN @

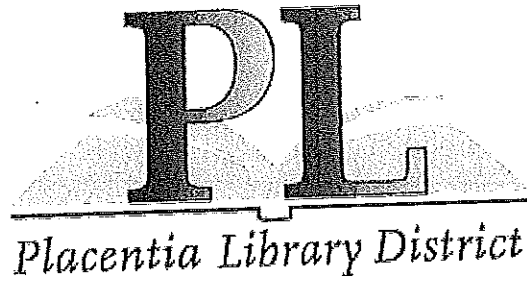
401 EAST CHAPMAN AVE., CA, 92870

SCALE: 1" = 20'



DRAWN BY
 OMAR TAHA
 ARCHITECT / CONTRACTOR

FENCE
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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: Review three (3) Strategic Planning Consultant Request for Proposals (RFP)

DATE: September 11, 2013

BACKGROUND

The Placentia Library District with the help of a strategic consultant produced a strategic plan on May 9, 2006. The plan was to be the roadmap for the Library for the year 2010. Since its completion, the trustees and library staff met on January 28, 2013 to review and discuss the document. The meeting provided an opportunity to assess the Library's budget needs and anticipate new service models and technology programs for our community.

The strategic plan serves a dual purpose as a reality checkpoint and an action plan for library staff. It also enables the public to understand the direction the Library is taking and the strategic implementation for services and programs the Library would like to offer over the next three to five years. The last strategic plan was written over seven years ago.

Library staff recommends the Library Board of Trustees consider procuring a strategic planning consultant. The consultant would facilitate, design, develop, assist in the implementation, and assess a new strategic plan to guide service development and resource allocation to reflect the needs of our community.

At the April 22, 2013 Library Board of Trustees meeting, staff was authorized to proceed with drafting an RFP for a Strategic Planning Consultant. At the June 17, 2013 Library Board of Trustees, the RFP was approved for solicitation of bids.

Attachment A is the consultant profiles

Attachment B is the proposal from BHI Management Consulting -- \$28,670

Attachment C is the proposal from Growth Management Consulting -- \$35,700

Attachment D is the proposal from The Ivy Group -- \$16,570 or \$41,370 (minimum)

Fiscal Impact: \$16,570 - \$41,370+

RECOMMENDATION

Library staff to arrange for consultants to make a presentation at a determined meeting date.

Strategic Planning Consultants Profiles

	BHI Mr. Brent Ives	GROWTH MANAGEMENT CONSULTING Mr. Eric Craymer	THE IVY GROUP Ms. Pam Fitzgerald Ms. Nancy Davis
Education & Education	<p>23 years in public service</p> <p>Organizational Behavior at the University of San Francisco</p> <p>Current Mayor of Tracy</p>	<p>MBA Marketing & Finance</p> <p>Certified Management Accountant (CMA)</p> <p>Graduate of the Carver Policy Governance Academy</p>	<p>22 years of experience</p> <p>Ms. Fitzgerald – McGill University with a bachelor’s degree & completed graduate work at Princeton</p> <p>Ms. Davis – Carnegie Mellon University with a bachelor’s degree & MLS from the University of Pittsburgh</p>
Fee	\$ 28,670	\$ 35,700	<p>\$ 41,370 (minimum)</p> <p>\$ 16,570 (does not include focus groups, telephone survey of households and market segmentation analysis)</p>
Consultant Location	Tracy, California	Grand Rapids, Michigan	Charlottesville, Virginia
Timeline	6.5 Months	6 Months	6 Months
Clients	<p>CSDA</p> <p>Conejo Recreation and Park District</p> <p>Pleasant Valley Recreation and Park District</p> <p>Hayward Creation and Park District</p> <p>Jurupa Community Services District</p>	<p>Howell Carnegie District Library</p> <p>Portage Public District Library</p> <p>Fremont Public Library</p> <p>Albion College Mudd Libraries</p> <p>University of Michigan, Dearborn Libraries</p>	<p>New Jersey State Library</p> <p>Highlands Regional Library Cooperative (New Jersey)</p> <p>Hoboken Public Library (New Jersey)</p> <p>Loudoun County Public Library (Virginia)</p> <p>Montgomery County Public Libraries (Maryland)</p> <p>San Antonio Public Library (Texas)</p>

BHI MANAGEMENT CONSULTING
"Organizational Efficiency for Special Districts"

July 23, 2013

Placentia Library District
Ms. Jeanette Contreras
RE: Strategic Plan
411 Chapman Av.
Placentia, CA 92870
Attn: Library Director

Dear Ms. Contreras,

We appreciate the opportunity to provide this proposal for the development of a comprehensive 5-year Strategic Plan for your Agency. We feel quite confident that the scope of work described in the proposal matches the direction and needs of the District. We have found that this approach meets and exceeds the desired outcome and best serves recreation and park agencies well for providing a meaningful and practical roadmap. We have assembled a team of seasoned and qualified experts in the fields specific to your needs including a subject matter experienced, Mr. Jim Raymond. While I will act as project manager for this project, a limited number of associates may contribute as well as subject matter experts to the benefit of the District.

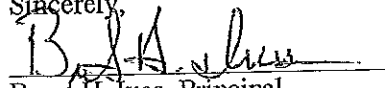
Our proposal will most likely differ from others in that we are the most experienced firm in the State working exclusively with California Special Districts in strategic planning. Additionally, I teach the course that the California Special District's Association uses for its training for Districts across the state. Most recently, CSDA selected BHI to do their strategic plan. Our planning methodology deliberately gets broad input for broad perspective and makes sure there is a clear and prioritized implementation plan that achieves buy-in from both the decision makers and the implementers. BHI has successfully applied our unique planning model to Special Districts in California for 12 years, getting glowing remarks on its usefulness, clarity, practicality, the ability to implement and its application. BHI is currently working on differing stages of 7 strategic plans in the State at this time. We also offer on-line training specifically to special districts across the country, one of which is in Strategic Planning for Special Districts. As part of this proposal BHI is extending free viewing of this informational on-line course for 30 days for the District. Video testimonials can also be found on the website, www.bhi.com/bhidistricts, in California.

We commit to the schedule included in the proposal to deliver to the Trustees a full Plan within the timeframe stated. Our pricing includes both effort and reimbursable expenses, is a fixed price quote (with expenses) with no hidden costs outside of the quoted costs. The bid price for these services is firm for 60 days from the bid date. Additionally, since we have worked with the District before on a similar topic, I have reduced my normal hourly fee. (please see proposal for details).

We look forward to working with you on this project. Please feel free to contact me with any clarifications, questions or comments you may have regarding this proposal. Additionally, we are certainly available for an interview with you on the details of this proposal at your convenience if needed.

Once again, thank you for this opportunity and we sincerely look forward to the opportunity of serving the Placentia Library District.

Sincerely,


Brent H. Ives, Principal
BHI Management Consulting

Enclosures:

- 3 copies of the bid proposal

-- Proposal --
Professional Services for a
Five-year Strategic Plan
for the
Placentia Library District
Placentia, CA
July 2013

*BHI Management Consulting
2459 Neptune Ct., Suite 110, Tracy, Ca.
(209) 740-6779, brent@bhiconsulting.com*

Executive Summary:

BHI proposes to provide the Placentia Library District with the professional services necessary to achieve a well-informed, well vetted and clearly implementable 5-year strategic plan. BHI will utilize its strategic planning model that has been recognized as the preeminent means of planning for special districts across California. BHI will gather input from various players within the context of District work, include the Public, Trustees, stakeholder groups and staff at several stages of creating the basis for the Plan, assist with assessing the needs within the community, then work with the District to create a clear and understandable and well-integrated implementation plan for monitoring progress of the plan as it evolves. Brent Ives, Principal of the firm, will be the lead project manager and it's proposed that Mr. Jim Raymond, a highly experienced public administrator, comprise the team to work with the District. BHI can meet all District insurance requirements and the requirements for the stated schedule. Table 1 below outlines the specifics of the costs which are proposed, in a fixed price contract, for \$28,670, including all costs for effort, travel and incidentals.

Scope of Project:

The objective of this proposal is to outline professional services to the Placentia Library District (District) for assistance in the preparation of a comprehensive five-year Strategic Plan (Plan). Brent Ives (Consultant), Principal of BHI Management Consulting, will be the consulting project manager and will supplement the team with a team member with subject matter experience. Details are outlined in the Task/Cost/Expense table below. BHI's effort and scope of work will be organized in the following manner.

Strategic Planning Overview and the BHI advantage:

Strategic planning utilizing the action-oriented model herein offers a number of benefits for a public agency. Crucial to any practical planning effort is a clearly delineated workplan in the form of projects, initiatives and actions that result from and get identified in the overall process. In this case, a five-year workplan will be forthcoming as part of the published Plan. This planning method focuses on assuring that the Community, Library

*-- BHI Management Consulting --
(209)740-6779
brent@bhiconsulting.com*

Trustees and Staff/employees are fully involved in the evolution of the Plan. This creates the broader leadership "TEAM" that is crucial for implementing a Plan that has buy-in from those who make the decision and implement and can be respected by the community, thus used as a true roadmap for the District.

Our planning model involves members of the elected Board of Trustees to deliberately engage at the proper level and provides a pathway for the articulation of true Mission and Vision statements for the agency. This is clearly the role of the elected/appointed officials and a place where they can reflect why the agency exists, what its clear role is and where they want it to go.

This method and model also allows for professional staff to do what they do best, organize and implement positive and productive work programs. The action oriented strategic planning model allows for linkage between the foundational statements of Mission and Vision to actual work plans, projects and initiatives that move an agency forward (see graphic model below). In this way the staff is allowed to show how they can meet the Vision and intentions of the Trustees by applying their professional judgment and expertise to the direction of the District.

Key to those responsible for making informed and knowledgeable decisions (Board of Trustees) is important input from the public and an understanding of the organization as it stands. These crucial parts of planning provide the decision makers and the staff implementers the proper focus as they develop and document the plan. On-going updates are also crucial to assure that the plan stays current, reflects the realities of the needs and conditions around the District and allows for new insights and direction from future Boards.

Top-to-Bottom planning creates important clarity for all involved by articulating the agency's future. Any reader can see a succinct Plan of where the District is going, why it's important, what the strategy is and how it intends to get there. The resultant Plan becomes the "way we plan here" for agencies that fully implement its annual maintenance and integrate it into the daily District workflow. It is usually about 30-50 pages long and contains an integrated overview table that shows the plan for each operational element of the District, what will be done and when. This table serves as the Executive Summary. Since the Plan articulates a clear view into the future, it truly eliminates many of the issues facing many public agencies today. Included in the planning process are clear steps to assure practical level usage and updating of the plan to keep it alive, well integrated and routinely used by the agency.

BHI has assembled a Team specifically for Placentia Library District that will assure project success. Mr. Brent Ives is well known as THE expert in strategic planning for Special District across California (*Please see Similar Projects section below wherein video testimonies are referenced from other districts managers*). Brent brings the experience of dozens of Plans accomplished and five currently working in the State at various phases of completion. BHI was the requested firm to offer Strategic Planning

Placentia Library District

curriculum for the CSDA and teaches District across the State in the subject. The CSDA itself selected BHI to work with them on their own strategic plan (see video testimony from Mr. Neil McCormick on the BHI website). The PLD gets the recognized expert as the lead project manager throughout this project.

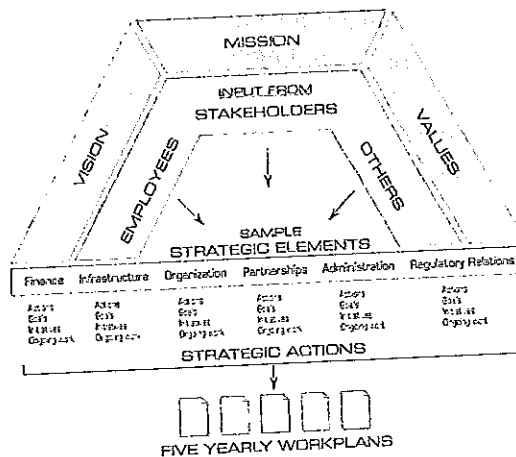
Additionally, we have assigned Mr. Jim Raymond, a recognized expert in public administration with library specific background with a successful California based career in the field for well over 40 years. Jim managed multi-million dollar level projects, hundreds of staff and administered numerous programs and services to thousands of California citizens in three cities. Jim holds an MS degree in Public Administration for San Jose State University. In 1993, Jim served the president of the California Parks and Recreational Association.

While BHI may utilize other associate consultants at no cost for various parts of the project, Mr. Ives and Mr. Raymond will attend to all aspects of this project. No more qualified, well-placed, well-respected subject matter experienced team exists for this project. See more information on each of the consultants below.

Specific Task Detail:

The work outlined herein is generally divided into 3 basic phases, with sub-parts:

1. Strategic Input
2. Board Strategic Plan Workshop
3. Strategic Plan Development



The general detail of these 3 phases is outlined below.

Phase 1- Strategic Input –

1a. BHI will conduct initial meetings with individual Trustees, Library Director, Board President and key staff if desired, to discuss background, develop specific approach to the various planning events and tasks and to discuss key coverage areas for inclusion in the Plan. BHI will at this time request all relevant District reports, budgets, revenue reports, assessments, surveys as needed in support of the project. This task will assist in assuring that the scope and overall focus is finely honed and developed to assure that both the approach and the Plan meet all needs and intentions. From this and more information, Consultants will perform an environmental scan that will provide an overview and some context for the strategic plan.

1b. Consultants will conduct meetings with all District employees to gather their thoughts and perspectives regarding future District-wide vision and strategy, while allowing their integration into the planning process. This allows the employees the opportunity to feed the Trustees with their future perspective for consideration in the Plan.

1c. Consultant and District senior staff will meet with nearby partner agencies to allow for them to discuss the future in the context of this effort and provide any perspective they may have for the Trustees to consider.

1d. Consultant will conduct a number of activities to collect public input and assess needs on the future and Plan. It is anticipated that we will conduct meetings with the public (2) to gather valuable perspectives on the future for Board planning consideration. This process will also allow the public the opportunity to provide guided and valuable input in the various areas of the Plan including Mission, Vision, Values and important future considerations for the Trustees to consider.

Additionally, it is anticipated that the public will be allowed to provide input on needs and future strategy on the District website through a survey, designed and administered by BHI. It is anticipated that the library's list of registered users will serve as the outreach for populating the survey.

BHI will also hold a specific meeting with the Friends of the Library group to collect their input and assess needs they see as important to address in the future within the Plan.

Phase 2 – Board of Trustees Strategic Plan Workshop –

2a. Prior to the workshop, Consultants will conduct interviews with each Board member to gather their thoughts and perspectives regarding the future of the District and collect their individual vision for the future. This allows for the individual members and Consultant to meet one another, share thoughts regarding planning and for the consultant to hear important background information. The interviews also allow for the best utilization of time at the workshop by properly focusing the discussions.

2b. Consultants will facilitate the Strategic Planning workshop (estimated 6-8 hours, if desired 2 meetings could be scheduled to accommodate the Trustees) with the Trustees including the following elements. This is a public meeting in workshop form. At the

workshop several deliverables are needed from the Trustees as collective positions, statements and Vision into the future. BHI will accomplish this work as follows:

- Re-visit, refine, clarify any current, or write new, Mission Statement, Vision Statement and articulate the Core Values of the District Trustees. In the case of BHI, we anticipate that this will be a streamlined discussion since BHI has spent time with the Board on this subject.
- Organize the future by determining the key strategic elements of District operations and management under which the workplan will be organized. The Trustees will then craft an objective and strategy statement for each strategic element. This statement provides clear and specific direction to staff as they assemble a five-year workplan that meets the Trustee's Vision. The assembled group will also briefly consider an overview of initial workplan strategies for each of the "strategic elements" to begin setting the five-year workplan.

Brent Ives and Jim Raymond will conduct this Board workshop which is open to the Public.

Phase 3 - Strategic Plan Document Development –

3a. The Consultant(s) will work with senior staff to produce progressive stages of the plan through to final draft phase. This plan will use input from the input, visioning phase and Trustees to work through broad strategy that will move the District forward. Plans will be scenario planned to allow for what-if scenarios, work with staff through financial variations needed, and to determine specific supportive actions and initiatives needed to support the overall vision. This is anticipated to comprise 4-5 meetings of this group (Document Delivery Team), generally on a bi-monthly frequency. Some of these meetings may be conducted via WebConference.

3b. Consultant will make a briefing presentation of the initial draft to the Trustees for "tone check" to assure that the Plan is headed in the direction expected.

3c. Consultant will provide a briefing presentation of the final draft for Staff to present to the Trustees. (Consultant can be available for this final presentation if desired.)

3d. Consultant will print and provide 25 bound copies of final Plan to the District along with electronic version on CD in Microsoft Word and .PDF formats.

Note: (BHI Management Consulting may utilize associate consultants to assist during planning sessions and steering committee work. Brent Ives, Principal of BHI will be the primary consultant for the project and attend all meetings and workshops.)

Preliminary Schedule (weeks approximate):

Engagement begins approximately three weeks from receipt of this signed agreement. The work outlined in the table below is also divided into 3 phases:

1. Strategic Input
2. Board Strategic Plan Workshop
3. Strategic Plan Development

The estimated schedule of these three phases is broken down below. Schedule depends heavily on ability to schedule meeting times and the availability of Board and Staff at the times proposed.

Task Set Schedule:

- | | |
|---|--------------|
| 1a. Initial meetings | (Week 2-3) |
| 1b-d. Input activities | (Week 5-7) |
| 2a. Trustee Interviews | (Week 5-7) |
| 2b. Conduct strategic planning workshop (Trustee/Sr. Staff/Public) | (Week 9-11) |
| 3a. Meet with Document Delivery Team to draft the plan (2-4 meetings) | (Week 12-20) |
| 3b. "Tone-check" meeting with the Trustees | (Week 20) |
| 3c. Present final plan to Trustees for approval | (Week 24) |
| 3d. Publish Plan | (Week 26) |

Terms and Conditions:

BHI Management Consulting shall perform above services as agreed under authorized signature amendment of the District. Consultant shall not begin work until receipt of signed agreement. Billing shall be monthly. The estimated costs per phase below are an estimated spread of hourly costs across the BHI organization. The cost for the three phases will generally be broken down as follows:

- | | |
|----------------------------------|-----|
| 1. Strategic Input | 40% |
| 2. Board Strategic Plan Workshop | 25% |
| 3. Strategic Plan Development | 35% |

Effort will be spread not to exceed the agreed amendment amount. Signature lines are provided below.

As part of this proposal, BHI offers a free access to our on-line one-hour video training in Strategic Planning for Special District a \$120.00 value. The 30-day access code is

Q6y8dK34g you can reach the class at

<http://www.bhiconsulting.com/courses/strategic-planning-full-course/>.

Estimated Costs and Rates:

This work is proposed on a fixed price basis. The total costs are all costs for effort and expenses are built in in a not-to-exceed fashion. Provided that the scope of work anticipated herein is correct and agreed into by the District, the District will not pay more than this amount for the services quoted above. The fixed-price quote is \$28,670.

Placentia Library District Proposed Effort Costs	Principal (Ives) @ \$255/hr.			Sr. Consultant (Raymond) @ \$140/hr.		Editor @ \$80/hr.		Labor Hours/task Total	Task Cost	Comments
	Hours	Hours	Hours	Hours	Hours	Hours				
1a-d. Strategic Input	24	22	0				46	\$ 9,200.00	Completed in two trips (multiple consultants for input work)	
2a-b. Board Workshop and prep.	12	10	0				22	\$ 4,460.00	One trip (two consultants)	
3a-d. Plan Document Development	32	0	10				42	\$ 8,960.00	Assumes two trips to meet with Staff for the Principal only plus two WebConferences	
TOTAL PLAN	68	32	10				110	\$ 22,620.00		

ESTIMATED Expenses	Time or Expense	Cost per		Cost Total	
Travel Expenses	Travel expense for In-District visits (assumes up to 9 individual trips)	Estimated expenses calculated @ \$550/trip/consultant	9 total visits to District area	\$ 4,950.00	Trips estimated herein include both Principal and associate for workshop only and can be reduced by near-by client cost sharing.
Graphic arts and document design and printing				\$ 1,000.00	
Web Conferencing/telephone costs		\$50/conference	2 WebConferences with webEx	\$ 100.00	
TOTAL ESTIMATED EXPENSES	0	0	0	\$ 6,050.00	
TOTAL COSTS				\$ 28,670.00	

Additional tasks, not covered specifically by this amendment may be added by contract addendum. The undersigned parties agree to the terms and conditions of the workscope as described in this amendment.

Authorization

Jeanette Contreras, Library Director
Placentia Library District
Placentia, CA

Date

Brent H. Ives, Principal
BHI Management Consulting
Tracy, CA

Date

About the Firm and Primary Consultants:

BHI Management Consulting brings unique qualifications to this project by a dual perspective approach to the process of advanced process strategic planning that are both practical and useful. The firm is owned and operated by Brent Ives and is located in Tracy, CA. It was begun in 1996 and has focused on providing for the organizational health issues of Special Districts since 1999. The firm carries Brent as the Principal and a number of subject matter expert associates, Mr. Jim Raymond, Senior Consultant (Parks and Recreation), Mr. Nick Pinhey, Senior Consultant (Organizational), Mr. Andrew Ives, Consultant (Recruiting/HR) and Ms. Lynda Ives (Editor). Other associates are contracted as projects demand relative to the engagement and/or Agency specific needs. Brent Ives will be the project manager for this project, and Jim Raymond will be assigned to this project as subject matter specific expert in the area of Parks and Recreation. Mr. Nick Pinhey will assist Mr. Ives with organizational and environmental assessment/scan. Ms. Swenson and Mr. Andrew Ives will assist with the community visioning effort.

Mr. Brent Ives has worked with hundreds of Special Districts and Cities across the State dealing with organizational issues primarily in optimizing operational approach for each Agency as needed. BHI is currently engaged with five similar projects with California special districts on strategic planning. Additionally, Brent serves as a faculty member on the Special Districts Governance Academy for Special District Board members, teaching classes in the "Foundations of Governance", "Setting Direction and Community Leadership" and "The Board's Role in Human Resources". Brent teaches the preeminent class in Strategic Planning class expressly for Special Districts for CSDA and offers on-line class work in the subject on the BHI website. Brent has taught representative Board members and staff from over 100 Districts across the state and Oregon. He is the Chapter Ambassador for the CSDA and teaches his own curriculum on Strategic Planning for Association sponsored classes across California.

He is educated in Organizational Behavior at the University of San Francisco, 26 years experience as a technical manager for the Lawrence Livermore National Laboratory and 14 years as a City Council Member in the city of Tracy, California. He is currently the directly elected Mayor of Tracy, California and a member of the Altamont Commuter Express (commute rail service) commission, and a member of the South County Fire Protection Authority in San Joaquin County and is Chairman of the San Joaquin Council of Governments. Mr. Ives has over 23 years in public service including broad range consulting and elected public service.

This broad experience in organizational effectiveness is captured by the agency when they commission BHI Management Consulting in Brent's experience and expertise. Brent is known for establishing a sincere and knowledgeable relationship with both the Board members and staff. Brent's time as an elected official allows him the perspective that helps him to "see" it from their points of view which assists in capturing the Board's will in going forward. Brent will lead the Agency through a solid, proven strategic planning process and conduct a thorough operational audit and findings that will be

Placentia Library District

realistic, honest, broad and integrated. Mr. Ives will be project manager and responsible to see to it that the entire project deliverable is complete to the District's satisfaction.

BIO of Sr. Consultant on this Project --

Mr. Jim Raymond is a subject matter expert in the area of public administration. He has over 35 years in the field as the Parks and Community Services Department Head for three California cities including the administration for a public library at the cities of Petaluma, Tracy and Alameda. He managed multi-million dollar level projects, hundreds of staff and administered numerous programs and services, to thousands of California citizens. Jim holds an MS degree in Public Administration for San Jose State University. In 1993, Jim served the president of the California Parks and Recreational Association.

Since 1996, BHI Management Consulting is a recognized firm that serves primarily California Special Districts in areas such as organizational performance, strategic planning, Board effectiveness, employee performance management and executive search. Mr. Raymond, as a subject matter expert in Recreation, will be primarily assigned to perform all public interactions and develop the Visioning process.

SIMILAR PAST AND CURRENT ENGAGEMENTS AND EXPERIENCE:

Conejo Recreation and Park District (Mr. Jim Friedl, General Manager, jfriedl@crpd.org), 805-381-1239), Led Board and staff through comprehensive strategic planning process. Process included extensive input from public, partner agencies and line-staff. Plan was completed on time and within the original budget.
VIDEO TESTIMONIAL AVAILABLE FROM JIM AT -
<http://www.bhiconsulting.com/about-2/>

Pleasant Valley Recreation and Park District (Mr. Dan Labrado, General Manager, Dan Labrado dlabrado@pvrpd.org, (805) 482-3468), Led Board and staff through comprehensive strategic planning process. Process included extensive input from public, partner agencies and line-staff. Plan was completed on time and within the original budget.

Jurupa Community Services District (District provides Water, Sewer and Parks and Recreation services) (Mr. Eldon Horst, General Manager, (951)727-3527, ehorst@jcsd.us.) Led Board and staff through comprehensive strategic planning process. Plan was done on time and within the original budget.

Hayward Recreation and Park District (Ms. Rita Shue, General Manager, shur@haywardrec.org, (510) 881-6700). BHI led the District through a comprehensive five-year strategic planning effort. The District serves over 120,000 people with recreation and park services in the East Bay in Northern California. Plan includes input

from numerous sources to assure that public needs are clear and integrated into the Plan. Partner agencies and the public also played a key role in gaining perspective in future leveraged associations. Brent is the Principal consultant for this project.

VIDEO TESTIMONIAL FROM RITA AVAILABLE AT -
<http://www.bhiconsulting.com/about-2/>

Tuolumne Utilities District, Mr. Pete Kampa, General Manager, (pkampa@tuolumneutilities.com), 209-536-6485). Project included the development a comprehensive five-year **Strategic Plan** for the District. The nature of the Tuolumne Utilities area in light of this effort created significant visibility with public and partner agencies. The Plan includes sections for both water and sanitary services. All public, employee and partner agencies have provided their input to the Plan through meetings.

Numerous others upon request.

CURRENT BHI PLANNING PROJECTS:

Orange County Sanitation District-- 5-year Strategic Plan

Laguna Beach County Water District -- 5-year Strategic Plan

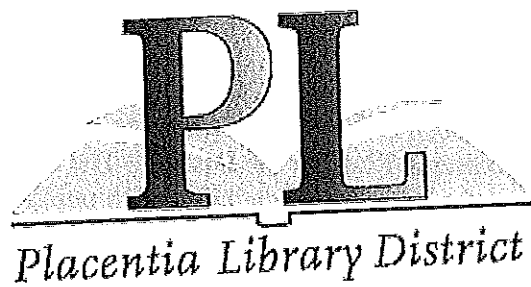
Grossmont Healthcare District -- 5-year Strategic Plan

Olivehurst Public Utilities District -- 5-year Strategic Plan

Marina Coast Water District -- 5-year Strategic Plan

Northstar Community Services District - -- 5-year Strategic Plan

West Bay Sanitary District -- 5-year Strategic Plan



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Strategically guiding organizations through successful change and growth!

August 6, 2013

Placentia Library District
Attn: Library Director
411 E. Chapman Ave.
Placentia, CA 92870

Dear Ms. Contreras and Board

Thank you for the opportunity to submit a proposal for the Placentia Library District's Strategic Planning. We would greatly like to work with you.

Growth Management Consulting, Inc. would like to identify itself as an offering firm for your proposal for strategic planning. Our information is as follows:

Growth Management Consulting, Inc.
2104 Celadon Dr NE
Grand Rapids, MI 49525
P: 517.281.4102
FEIN#38-3306932

The Request For Proposals seemed to indicate a rather rigorous research from external sources to achieve a truly visionary plan. We have developed a proposal which we believe will do that. That extensive research also comes with a significant investment of time and cost. If we misunderstood, or if you rethink, we are quite happy to do a thorough process which includes slightly less secondary research and forgoes the personal connections with library thought leaders and innovators. This would likely reduce the required investment by 3 days of total investment.

During the period of proposal evaluation you may contact Eric Craymer, President, at:

Growth Management Consulting, Inc.
2104 Celadon Dr NE
Grand Rapids, MI 49525
P: 517.281.4102
EricCraymere@GrowthManagementConsulting.com

This proposal shall remain valid for a period of 90 days from the date of submittal. As the President of the firm I am authorized to bind Growth Management Consulting, Inc. to the terms of the proposal.

Thank you,

Eric Craymer, President
Growth Management Consulting, Inc.

2104 Celadon Dr NE, Grand Rapids, MI 49525 • Voice: 517-281-4102 • Email:
EricCraymer@GrowthManagementConsulting.com
Web: www.growthmanagementconsulting.com



Proposal for Strategic Planning Consultant

Prepared For:
Placentia Library District

Presented by:
Eric Craymer
Growth Management Consulting, Inc.
Teri Terrace, Suite 100
East Lansing, MI 48823
(517)-337-1518
www.GrowthManagementConsulting.com

Executive Summary

This proposal is based on our best efforts to understand and address your needs from what we read in the RFP for Strategic Consultant. It is offered as a framework and a methodology that will achieve the desired results. We recognize the possibility that if awarded the opportunity to work with Placentia District Library we may learn more about the situation, the organization and its culture and are totally open to revising the plan to better align with any or all of the above.

Specific and more detailed explanation can be found below but this section will outline an overview of the proposal.

In addition to the process suggestions in the RFP our proposal includes seeking out and contacting a number of successful innovative libraries and a number of library thought leaders to truly get a sense of the future. These steps would move the process out of the traditional future planning and into visionary planning. We are proposing to conduct the work over three intensive on site visits and with additional interactions via survey, email, phone and video conferencing to assure both quality information and cost containment.

Specifically the plan calls for the accomplishment of 6 main areas of work (which are fleshed out in detail in the proposal):

1. Setting a scope and focus for the work.
2. Developing a knowledge base by gathering data to make informed decisions and recommendations.
3. Assessment, synthesis and summary of the data gathered and its implications.
4. A Planning Retreat with the Board of Trustees to set the frame for the values, vision, objectives, goals and priorities for the plan and its affect on services, programs, facilities and, ultimately, the Library's ability to meet the needs of its patrons.
5. Initial draft and refinement of the plan using the Board's input, combined with the assessment of information gained in the data gathering process and the guidance of the Planning Committee to ensure it reflects the best recommended path forward.
6. A final revision of the plan which is presented to the Board of Trustees.

The work will be primarily done by the President of the company, Eric Craymer, but will also utilize the library expertise of a second consultant with deep library credentials, Randy Dykhuis. Interviews and secondary research will augment the knowledge and experience that the pair of us brings.

The timeline expects that the work begins in September 2013 and completes no later than March of 2014 culminating in a formal presentation to the Board of Trustees designed to both familiarize them with the Plan and to illustrate to them how their direction is tied to it and their vision will be fulfilled by it.

Summary Understanding of Situation

Placentia Library District (PLD) is a special district library in Orange County serving approximately 55,000 residents, 351,649 card holder and 283,696 visitors who checked out 203,403 items from its 22,800 square foot library. Its primary source of funding is from special district property tax revenues and its minor sources of funding are from local revenue sources and the Placentia Library Friends Foundation.

PLD, as are all libraries today, is faced with rapidly changing needs, technologies and revenue challenges. The last strategic plan was developed in 2006 and they desire to develop a new plan to cover 2014-2019. The Strategic Plan will incorporate input from interested parties, community growth and demographics trends, service needs based on both universal and local trends in consumers and technology. It will be a plan which can show a specific road map to a desired future. The roadmap should be specific enough to guide strategic and operational decisions but flexible enough to accommodate regular reviews and revisions based on actual results and a changing environment.

The plan will be guided by an informed assessment of the driving forces behind the library's success, its special mission in the community, the input of staff, the values and vision of the Board of Trustees, and information from selected community parties. It will result in a guide to organizational planning and decisions concerning programs, services, staffing, process, funding and facilities and will contain specific recommended actions, goals, and measurable objectives.

To help them with this work the Library is seeking a consulting company that understands libraries and their unique dynamics and who can help the library define its future and develop a plan to reach it. Growth Management Consulting is please to be considered for this role.

Proposed Work Solution and Rationale

The major deliverable is a strategic plan which builds on an understanding of the factors internal and external to the library and which includes both a vision for the future and a plan to get there. This plan will incorporate objectives, goals and measures and will require an understanding of the environment as well as a deep understanding of the library's purpose, unique qualities and values.

Getting to that deliverable will require a series of components, each of which builds upon those coming before it. Those components are:

- Setting a scope and focus for the work.
- Developing a knowledge base by gathering data to make informed decisions and recommendations.
- Assessment, synthesis and summary of the data gathered and its implications.
- A Planning Retreat with the Board of Trustees to set the frame for the values, vision, objectives, goals and priorities for the plan and its affect on services, programs, facilities and, ultimately, the Library's ability to meet the needs of its patrons.
- Initial draft and refinement of the plan using the Board's input, combined with the assessment of information and guidance from a Planning Committee to ensure it reflects the best recommended path forward.
- A final revision of the plan which is presented to the Board of Trustees.

Note: in the interest of cost containment the process will include both in person contact (which will attempt to maximize the impact of each trip) in combination with as much distance interaction as possible (including phone, email and video conferencing). The goal will be to spend as much face time as needed for a successful but conclusion but to hold it to just enough such time to contain the costs of the process.

Steps Required to Achieve the Solution:

Setting the Scope and Focus

The consultant will meet with the Board President, Library Director and Business Manager to set the scope and focus of the work and to determine a Planning Committee which will be involved in the ongoing evolution of the Strategic Plan.

Developing a Knowledge Base for Planning

Using a wide range of sources the consultant will identify a clear understanding of the trends and actualities that drive the current situation, the desired future and an approach to get there.

Included in these sources are:

- Review available statistics, any existing surveys, library data and other materials to assess the library's environment and also provide peer comparisons.
- Review trends in library services and technology to provide an analysis of how these directly impact planning by PLD.
- Identify successful innovative library approaches to determine new approaches and perspectives (including when possible speaking with Directors or other top Management in 60 minute phone interviews, up to 5 libraries).
- Identify and interview library thought leaders concerning the future and the competencies libraries should be preparing for (up to 4 interviews of 60 minutes each).
- Survey all staff to gather information on: user wants and needs, user frustrations, process issues, space issues, staffing issues and any thoughts they have about what would form better relationships with non-users and other community organizations.
- Test insights from the survey in focus groups with staff representatives.
- Interview library leadership, including the director, senior management, and Board members to gather insight into the current library organization and its services.
- Interview selected groups of key community leaders/organizations to gather information about future needs and priorities, desired future for the community as a whole and to help gauge the potential for community collaborations (up to 8 individual interviews of 30-45 minutes each or up to 3 round table discussions with 3-5 leaders of 90 minutes each).

Assessment, Synthesis and Summary of Data and its Implications

The consultant will sift through the data gathered, weighing it as appropriate, and develop an organizational level view of the current and trending dynamics and states that should be incorporated into the process for Strategic Planning. This will include:

- Balancing views and input from multiple sources into a universal vision.
- Identify the likely impacts and importance of that vision and its key elements based both on the raw data and an understanding of the challenges and opportunities facing all libraries.
- Create a "storybook" of the major themes and their likely trajectories.
- Develop a set of likely implications for PLD's future success in serving its community.

Design, facilitate and document a Strategic Planning with the Board of Trustees and Director
 The goal of the retreat will be to have at least a broad form of draft values, vision and priorities which will guide the development of the Strategic Plan. While not the plan itself, these will serve as the "bones" upon which it is built. Specific elements of the Retreat will include:

- Develop a briefing book outlining the findings and implications of the data gathering.
- Assign a number of cutting edge articles on trends and/or innovative library approaches for the future.
- Conduct an online survey of individual members to gather insights, concerns, priorities and values.
- Provide the Board with a summary of the themes found in the survey which can then be used as a starting point for the Retreat.
- Design a work process to guide the Board through strategic thinking to identify a shared sense of values, vision, objectives, strategies, goals, actions and priorities.
- Facilitate the retreat.
- Provide documentation of the key discussions and conclusions.
- Meet in person with the Planning Committee to assess and identify insights.

Develop and refine a Strategic Plan using Board input and data synthesis

Using the board's input as the framework, and using input from the Planning Committee, the consultant will draft and strategic plan. This initial draft will be further refined through a process of feedback from the Planning Committee and its incorporation into the Plan. This will include:

- Refine the objectives, strategies and priorities provided by the Board.
- Combine these with the knowledge gathered earlier.
- Develop a set of "best paths" for moving the library from where it is to where it wants and needs to be to successfully meet the particular needs of its community that the library is in the best position to fulfill.
- Develop the strategies, plans, goals and measurable objectives for moving from today to that future.
- Incorporate recommendations for not only strategy but its impact on services, programs, finances, staffing, technology, collections and other operations.
- Outline a clear and easily followed process for the Board and Management to update the Plan and its components as things are learned internally or as things change externally. This will be based on a "learning community" approach which will utilize a "strategic systems thinking" process.
- Exchange drafts of the Strategic Plan with the Planning Committee for their suggestions and input (up to 3 times including the very first complete draft).

Present the Final Plan to the Board of Trustees

The final revised Strategic Plan will be presented to the Board of Trustees during one of their regular meetings or in a special meeting held for this purpose. In that session the consultant will:

- Summarize the driving factors for the Final Strategic Plan.
- Describe the elements of the Plan and how they relate to both the driving factors and the values, vision, goals and priorities of the Board.
- Explain the process for measuring progress and for updating the plan on at least an annual basis.
- Answer questions and make clarifications as needed.

Specific Deliverables

The work proposed will include a complete Strategic Plan that will be designed to meet your objectives in a manner which accounts for the dynamics of the institution, the future and the community. Specific deliverables included in the plan are listed below.

- Assessment of current organization's environment, peer comparisons and review of current trends in library service.
- Summary of the information gathered and its implications.
- Written report of the library's strategic plan with measurable goals and objectives and including a strategic decision framework to guide decisions and choices.
- Methodology for the library to use to update and evaluate their plan and library services as changes in knowledge or environment occur.
- Recommendations for improvements in library services, including collections, professional staff development, technology, operational process, communications, funding strategies and partnership possibilities.
- Notes and documentation from surveys, focus groups, and interviews.

Timeline

Major Process Components				
1. Set scope and gather initial data	⇒	2. Gather additional data and survey Board of Trustees	⇒	3. Facilitate Retreat
			⇒	4. Draft and revisions of Strategic Plan
				⇒
				Final Strategic Plan Presented
Approximate Timeline				
September 2013		October - November 2013	December 2013	January - February 2014
				March 2014
Types of Interactions				
<i>Distance and in person (on site, 3 days)</i>		<i>Distance</i>	<i>In person (on site 1.5 days)</i>	<i>Distance</i>
				<i>In person (1 day)</i>

Potential Investment

We offer a rate of \$1,800 per day to non-profits (regularly \$2,400 per day). In this case, given the amount of time involved and our strong desire to work with you, we are offering you a discounted rate of \$1,500 per day. The investment is calculated by multiplying the estimated hours involved times the associated hourly rate. If the allocation of time or budget seems inappropriate for the organization we are happy to discuss refining the process to fit your needs.

Activity	Estimated Days	Estimated Investment
Setting the scope and initial data gathering (including staff survey, site visits and staff forums).	5	\$ 7,500
Identify and contact successful innovative libraries and library thought leaders.	3	\$ 4,500
Data assessment, Board survey, Board preparation work, retreat design.	6	\$ 9,000
Design and facilitate retreat, document, debrief with Planning Committee in person	3	\$ 4,500
Draft strategic plan and revise with Planning Committee input	4	\$ 6,000
Present final Strategic Plan to Board of Trustees	1	\$ 1,500
TOTAL INVESTMENT	22	\$33,000

Travel Budget

Placentia Library District will reimburse consultant for actual expenses for air and hotel, total expenses not to exceed \$2,700 based on 3 trips @\$900 each (including airfare, ground transportation and accommodations).

Specific References

Kathleen Zaenger Library Director Howell Carnegie District Library zaenger@howelllibrary.org (517) 546-0720 ext. 112	Nancy Robertson State Librarian Library of Michigan robertson@michigan.gov (517) 373-5511
Tim Richards Library Director (retired) University of Michigan - Dearborn Libraries tfrichards@gmail.com (734) 662-9379	Tracy Rochow Byerly Executive Director Missouri Library Network Corporation tracy@mlnc.org (314) 394-1320 ext 801

About the Consultant – Eric Craymer



Eric Craymer is the President and senior consultant for Growth Management Consulting, Inc. Eric brings a unique blend of professional training and practical experience to the projects he is associated with. He has been a business owner, researcher, manager, and consultant. His experience includes direct leadership roles with several start-ups and turn-arounds in both the retail and trade association environments as well as consulting in both the private and public sectors. Projects include:

- Leading and/or facilitating strategic thinking and planning sessions.
- Facilitating organizational development in an uncertain future through the use of scenario analysis and planning.
- Organizational development including management team development and board development.
- Providing guidance to organizations entering the start-up stage or transitioning from the entrepreneurial to the professionally managed organizational lifecycle stages.
- Instructing groups of different sizes in topics of expertise using seminar instruction, large group presentation, and individual learning methods.
- Installation and coaching within the Carver Policy Governance® model.

Eric earned an MBA from Michigan State University with a major concentration in marketing and with a secondary focus on classes in finance. His undergraduate degree, also from Michigan State University, was in Personnel Management with a dual major in Psychology. In addition, he is a Certified Management Accountant (CMA) in good standing with the Institute of Management Accounting and a graduate of the Carver Policy Governance® Academy.

He has authored two research articles on firm growth with Dr. Glenn S. Omura of the Eli Broad School of Business Management at Michigan State University. The first, *The Liability of Growth; A Second Critical Period of Liability*, was presented at the American Marketing Association's Marketing and Entrepreneurship Conference, New York, August 1995. The second, *A Portfolio Approach to Modeling Firm Growth Patterns*, was presented at the 41st International Small Business Conference World Conference, Stockholm, Sweden, in June 1996.

Eric has just completed his term as Director and Chair for the International Policy Governance® Association and is currently serving as a member of the Steering Committee for the CUES Center for Credit Union Board Excellence.

About the Consultant – Randy Dykhuis



Randy Dykhuis is well grounded in both the library and non-profit environment, with a background of excellent experience and skills.

In 1995, Dykhuis was chosen as the Executive Director of the Michigan Library Consortium (MLC). He held that post until 2010 when MLC combined with the Indiana Cooperative Library Services Agency. Dykhuis was named Executive Director of the new organization, the Midwest Collaborative for Library Services (MCLS). As Chief Executive Officer for two multitype library consortia, Dykhuis has been responsible for all aspects for planning and executing the organizations' strategic objectives. He currently manages a staff of 20.

Dykhuis earned his Masters of Science in Library Science from Wayne State University in December 1983. In January 1984, he became a reference librarian at Grace A. Dow Memorial Library in Midland, Michigan. As a member of the reference team, he assisted with collection development, selection of materials, and answering questions at the desk. During his tenure, Dykhuis introduced online database searching and helped choose additional automated reference tools. In 1987, Dykhuis accepted a reference position at Grand Rapids Public Library and helped the library further develop its library automation, with a focus on online reference tools.

From 1988 through 1994, Dykhuis was a marketing representative at OCLC, where he was twice awarded the President's Award for distinguished service.

In 1994, Dykhuis moved to OHIONET, a multitype library consortium in Columbus, Ohio, as Director of OCLC Services. He served a senior administrator and was involved in long range planning for the organization.

Dykhuis is active professionally, presenting and publishing at state, regional, and national conferences. He is a member of the American Library Association, the Association of College and Research Libraries, the Association of Specialized and Cooperative Library Agencies, the Michigan Library Association, and the Michigan Association of Media in Education.

About Growth Management Consulting

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Growth Management Consulting, Inc. is a consulting firm based in East Lansing, Michigan. They specialize in helping clients determine where they need to be and in making the actual changes in behavior required to get there. We serve clients in the region and across the United States. Our essential goal is to help organizations that make a difference be more effective. To do this we assist with group decision making, strategic planning, facilitation of dialog, modeling, governance and more.

Expert Areas:

- Strategy.
- Marketing.
- Governance.
- Strategic alignment (aligning operational systems and processes with the strategy).

Unique Value

Growth Management Consulting has many qualities that increase value and success including:

- A strong understanding of both business and governance.
- A range of experience with clients of varying size, industry, taxable status, and mission focus.
- Being pragmatic about solutions and methods.
- Being respectful and accepting of individuals and the organization as a whole.
- Having a “real hands-on” history as a manager and business owner.
- Being able to see the big picture and translate it into the necessary steps for implementation.

Services

We offer many services that include:

- Strategic Thinking and Planning
- Strategic Alignment of Systems, Processes and People
- Strategic Decision-Making.
- Leadership Development and Coaching.
- Scenario Development and Analysis
- Board/Staff Relations.
- Performance Management Systems
- Organizational Assessment.
- Complex Change Management.
- Computer Simulated Strategy and Process Models
- Installation of and coaching in Carver Policy Governance®
- Open Space Technology
- Other Dynamic Solutions

Facilitation Areas:

- Strategy making.
- Decision making.
- Organizational change.
- Team and community building.

Drawing Upon Knowledge In:

- Decision Making
- Business Strategy
- Business Operations
- Systems Knowledge
- Adult Learning Theory
- Group Dynamics
- Interpersonal Dynamics
- Organizational Behavior

Resulting in a systemic approach to organizational effectiveness; fixing the cause, not just the problem.

Community and Governmental Organizations

Client Name	Location	Nature of Work
Fremont Public Library	Michigan	Strategic planning
Portage Public District Library	Michigan	Strategic planning
Gift of Life Michigan	Michigan	Strategic marketing
University of Michigan - Dearborn Libraries	Michigan	Strategic planning, leadership development
Cooley Law School Library	Michigan	Organizational development
Ingham Regional Medical Center	Michigan	Customer service
Howell Carnegie District Library	Michigan	Strategic planning at both board and staff levels
Buena Vista Regional Medical Ctr	Iowa	Governance
Department of Natural Resources	Michigan	Organizational design
Lucille Gorham Intergenerational Community Center	North Carolina	Community renewal
Ann Arbor Transit Authority	Michigan	Organizational design

Associations and Consortiums

Client Name	Location	Nature of Work
Michigan Library Consortium	Michigan	Organizational development, strategic planning, governance, policy development
PALINET	Pennsylvania	Governance, policy development
Missouri Library Network Corporation	Missouri	Strategic planning
Industrial Fabrics Association International	Minnesota	Governance, policy development
Small Business Association of Michigan	Michigan	Strategic planning
North American Quiltline Consortium	California	Governance

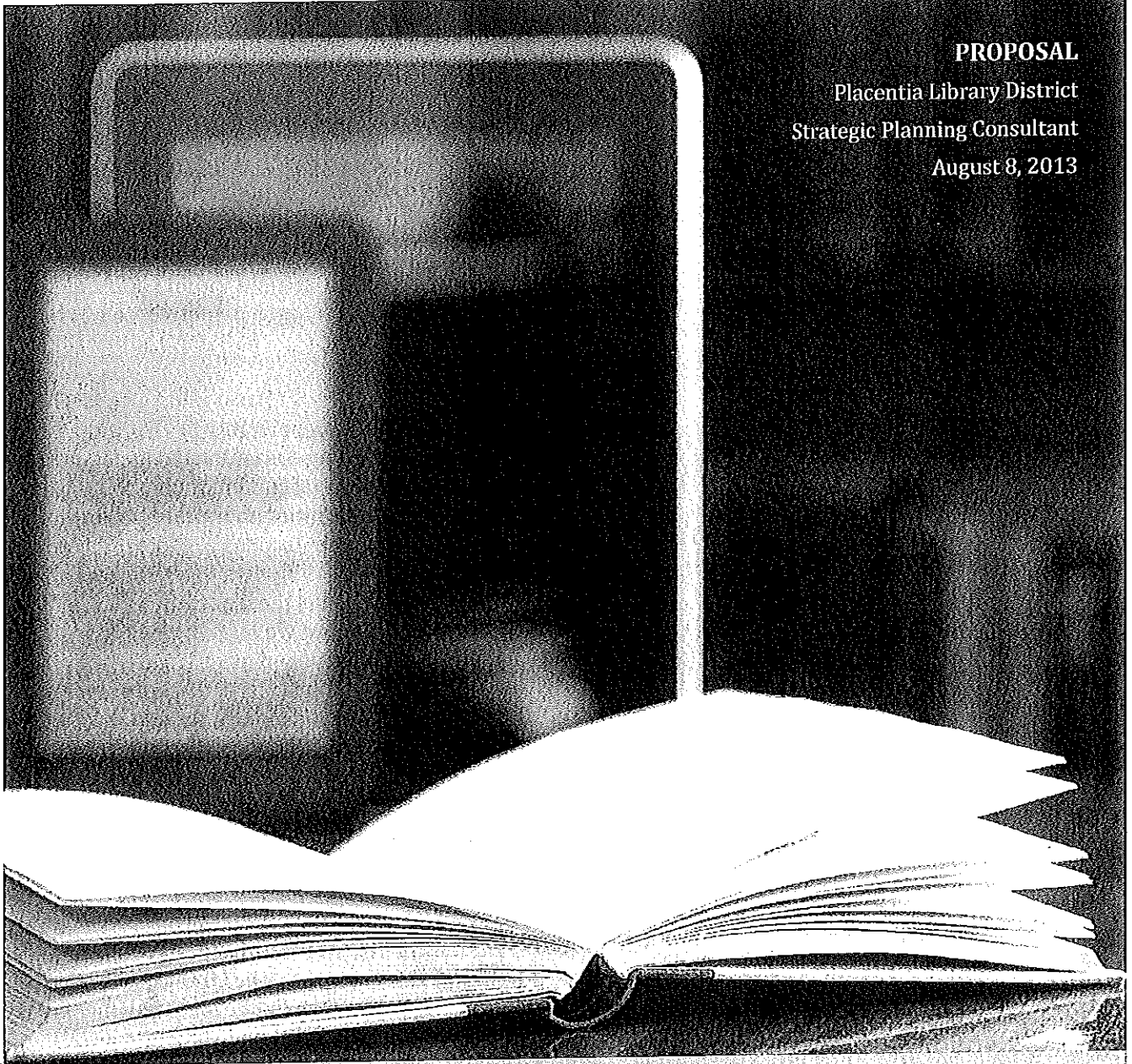
Education

Client Name	Location	Nature of Work
College of Human Ecology, Eastern Carolina University	North Carolina	Organizational development, conflict management, community building, strategic planning
Grand Rapids Community College – HR (sub-contractor)	Michigan	Organizational development and strategic alignment
Grand Rapids Community College – Board	Michigan	Governance
Detroit College of Law at MSU	Michigan	Organizational development
Albion College Mudd Libraries	Michigan	Strategic planning
Northview Public Schools	Michigan	Governance
Highland Hall Waldorf School	California	Governance

PROPOSAL

Placentia Library District
Strategic Planning Consultant

August 8, 2013





August 8, 2013

Ms. Jeanette Contreras
Library Director
Placentia Library District
411 East Chapman Avenue
Placentia, CA 92870

Dear Ms. Contreras:

On behalf of Ivy Library—a division of The Ivy Group, Ltd.—thank you for the opportunity to present our credentials as library planning consultants. We have a long standing commitment to libraries, literacy organizations, and educational institutions and offer an unusual combination of experience in organizational development, community needs research, and facilities and technology assessment and planning.

In the pages that follow, we have provided a menu of services from which we feel the Placentia Library District can benefit. We have deemed a selection of services optional, but we encourage the Library to choose any combination of the services offered to achieve its objectives.

The Ivy Group produces pragmatic, relevant, actionable strategic plans that build support for and increase use of public library services. For large and small libraries and library systems across the country, we have conducted the research and managed community and facility assessments so that the ensuing plans resonate with internal and external constituencies. The question that we encourage library leaders to ask themselves is, "What kind of experience will our customers want when they come into their public library in the future?"

Our library projects have ranged in size and scope, challenges and opportunities, but one fact remains constant: we are passionate and effective advocates for libraries. Most recently, we have developed strategic plans for the Des Moines, Gwinnett County, and San Antonio Public Libraries. We also conducted a six-language community needs assessment for the Brooklyn Public Library. We worked in Canada with a system serving multiple urban clusters. Our work with the State of New York centered on research, strategic planning, branding, and marketing of the New York Online Virtual Electronic Library (NOVEL), and we are currently engaged in a similar project for the Commonwealth of Pennsylvania's electronic databases.

The Ivy Group has planned and facilitated strategic planning training programs for the State Library of New Jersey and the Public Library Association. We were selected by OHIONET to develop the content for and present its 2012 Library Leadership Ohio institute and The Ivy Group will be planning and facilitating the program again in 2014.

In the course of all these projects, we maximize available resources, build consensus, complete assignments on time, respect budgets, and work effectively with internal staff. Clients will attest to our ready availability and flexible approach to assignments. We are comfortable managing projects in which the concerns of multiple stakeholders must be respected. This skill will be particularly valuable as your library seeks "buy-in" for sustaining the quality of public library service delivery in Placentia.



Our consulting team looks forward to meeting you and your colleagues and learning more about your vision of future services in your community. From these initial conversations, the direction is set not only for research and planning but also for the efficient management of the process and outcomes.

The materials that accompany this letter detail our market research and strategic planning experience and qualifications—particularly as they relate to libraries and other non-profit institutions. We would be very glad to answer any questions related to this proposal.

Thank you again. With best wishes, I remain

Yours truly,

A handwritten signature in cursive script that reads "Nancy H. Davis".

Nancy Davis, Partner
The Ivy Group
1489 Baltimore Pike, Suite 205
Springfield, PA 19064
610-544-4040 (o)
610-544-4055 (f)
ndavis@ivygroup.com

P.S. For additional information about Ivy Library's library development services, we encourage you to visit www.ivylibrary.com.



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Executive Summary

The Placentia Library District (PLD) seeks an experienced library consultant to formulate and implement its next strategic planning initiative. The overarching objective is to craft a compelling vision and plan with supporting strategies that will chart a course for the Library District for the next three to seven years and beyond.

To achieve this objective, the staff and Trustees seek to understand the needs and preferences of both current and potential customers regarding their public library and to identify important demographic trends and shifts that will affect the future delivery of public library services in the Library's service area. The ongoing engagement of Trustees, senior staff, and members of the Strategic Planning Steering Committee during the course of the planning process will be critical to its success.

The Ivy Group's consulting team brings significant experience in public library administration, market research, and strategic planning development.

We are familiar with many models of service delivery and the most frequently used approaches to strategic planning for libraries. We are experienced meeting facilitators and trainers.

The assessment process we propose will:

- Integrate proven qualitative and quantitative research methodologies that have been productive when used by other libraries in their strategic planning endeavors;
- Consider public library and technology trends, analyze regional demographic and psychographic data, and incorporate planning and secondary documents, etc.;
- Generate widespread input from residents of the Library's service area and yield statistically reliable data;
- Measure possible strategic initiatives against a "library initiative litmus test" that will ensure recommendations are reasonable and achievable; and
- Respond directly to issues identified during the information gathering process as critical to the Library's future success.



Key Personnel

Nancy Davis, Partner, The Ivy Group, Ltd.

Nancy Davis will be project director and liaison between the consulting team and the staff of PLD. She will also be responsible for planning and implementing all research studies, assisting with the preparation of the plan, and coordinating all project meetings and communications.

Nancy has worked for more than twenty years in public, academic, and special libraries. Before joining The Ivy Group, Nancy worked in the research department of a Fortune 500 company where she managed the corporate budget for information services; hired, trained and supervised the performance of 15 reference librarians; and functioned as a member of the company's executive management team.

Nancy offers clients of The Ivy Group access to a menu of diverse research methodologies including focus groups, telephone surveys, mall intercepts, mail surveys, in-depth executive interviews, and online surveys. She has been the project director for numerous community assessments conducted by public libraries in Pennsylvania, New Jersey, New York, Iowa, Delaware, Georgia, Oregon, Maryland and Virginia. Additionally, she is skilled in collecting research from secondary resources, analyzing and integrating it into primary research findings, and using the information as the foundation for actionable, cost-effective strategic plans. Nancy was the director for all library projects outlined in this proposal.

Nancy is a graduate of Carnegie Mellon University and has an MLS from The University of Pittsburgh. She has been an Adjunct Marketing Instructor in Clarion University's Graduate School of Library Sciences. She is a member of the American Library Association, The Pennsylvania Library Association, and Past President of the Greater Philadelphia Chapter of the National Association of Women Business Owners.

Pam Fitzgerald, Managing Partner, The Ivy Group, Ltd.

Pam has orchestrated successful planning initiatives that have generated growth and new opportunities for clients. Her ability to analyze and leverage an organization's strengths and to implement coherent, actionable plans has resulted in programs that make the best possible use of available resources and innovative partnerships.

Pam has written a national column on adult literacy as well as numerous award-winning marketing communications materials. She created the "I DREAM...I READ" contest for R. R. Bowker and authored a child's "Private and Personal Reading Journal" which the publisher markets to school systems and literacy programs across the country. She has also been a presenter and speaker at national conferences on literacy, libraries, and information management. As a member of The Ivy Group team, Pam will assist with the interpretation of research results and help craft and revise the strategic plan.

Pam received her undergraduate degree from McGill University and completed graduate work at Princeton and Bryn Mawr College.



Catherine Alloway, Library Consultant

Catherine Alloway has over thirty years of experience in public libraries. In fact, her first job was at the Saint Louis Public Library. She currently serves as the Executive Director of the Schlow Centre Region Library in State College, Pennsylvania and was formerly Director of Public Services for the Dauphin County Public Library. While Director of the Hershey Public Library, Cathi led the successful efforts of the Board of Trustees and the Friends of the Library group to raise the funds needed to build a new library facility. She secured a lead gift from the Hershey Foods Corporation and organized a grassroots campaign in all of the neighborhoods served by the Library.

Catherine has a BS and an MLS from the University of Michigan, and served as an intern at the Library of Congress. She is the Past President of the Pennsylvania Library Association. As part of the consulting team, Cathi will conduct the benchmarking study.

Darro Willey, Library Facilities Consultant

Darro Willey retired three years ago as the Director of the DeKalb County Library (GA) In that capacity, he had direct responsibility for all aspects of planning and operations for the 22-branch urban library system serving 727,000 residents of East Metro Atlanta, and he developed the Library's master facilities plan. During his tenure, the County approved a bond to cover the costs of improving library facilities, and Darro oversaw twelve construction projects. One of these projects, the Toco Hill-Avis G. Williams Library, was featured in *Library Journal's* May 2010 editorial as a prime example of new trends in library design.

Prior to assuming the Director's responsibilities at DeKalb, Darro worked at the Broward County Library for fourteen years. For eight years, he served as its Deputy Director, supervising the day-to-day operations for the 32-branch urban library system serving 1.4 million residents. During this time, the Broward County Library had a budget of \$26 million and a staff of 660. His responsibilities also included all system construction and automation.

Darro also has more than twenty-five years of experience working as a library consultant for larger library systems. He has had experience with the planning of more than 50 public and academic library buildings, and he has provided facility master planning services to 15 library systems in the southeastern United States, including Florida, Georgia, South Carolina, Texas, and Virginia. Darro has an MLS from Emporia State University in Kansas and a Ph.B. from the University of North Dakota.

Darro was a member of the American Library Association, the Georgia Library Association, and the Urban Libraries Council. He served on the Georgia Public Libraries Service State Standards Committee and on the Library Construction Committee. Darro is now a resident of California.



Ellen Roberson, Project Manager

A native of Tennessee and a graduate of the University of Virginia, Ellen Roberson began her career in Communications Management in the financial services industry. She manages all facets of Ivy Group projects, with particular emphasis on client communications and logistics. A consummate project manager with a meticulous eye for detail, Ellen will oversee timelines and work deliverables for the Library and devote particular attention to the editing, design, and production of all survey instruments and reports.

Bobby Pearson, Senior Programmer

Our network and hosting manager, Bobby Pearson is a skilled programmer who has developed integrated business and data management systems for our clients. He has been the team leader for all of the online surveys The Ivy Group has implemented and websites we have designed for our library clients. A graduate of the University of Virginia, Bobby will be responsible for programming and launching any online surveys recommended in the work program.

Chris Ricci, Field Research Director, Ricci Telephone Research, Inc.

Chris Ricci has more than 20 years of experience conducting telephone surveys, local, state, and national political polling, and studies for Fortune 500 and 1000 companies. The results of research conducted under his supervision have been disseminated widely and covered by CNN, US News & World Report, and the Wall Street Journal. Chris attended Penn State University and is a member of the Marketing Research Association.

The data collection facility features 50 outbound WATS lines as well as inbound 800 numbers. Interviewers work on a state-of-the-art CATI system that runs on TAG WinQuery & Query XM with nightly off-site backup routine to preserve data integrity. Supervisors with at least 20 years of interviewing experience direct the work of 45 employees. This highly skilled and meticulously trained field research team has worked with The Ivy Group for twelve years and has conducted the field work for all library studies detailed in this proposal including the community needs assessment for the Brooklyn Public Library, which required conducting telephone interviews in six languages.

Marc Futterman, President/CEO, CIVICTechnologies

Marc Futterman has over two decades of experience in combining information technology, urban planning, real estate, strategic planning, and community consensus building methods to successfully execute complex public agency and private sector initiatives. The success of Marc's practice is the ability to understand the nature of a client's problem and to lead or participate in a team-oriented process to develop innovative, creative, and fitting solutions. Marc's creative approach combines a strong knowledge of policy issues with equally strong management skills and an understanding of social trends and the impact of emerging technology on social change.



Marc has extensive experience in applying market analytics and business intelligence, including the use of market segmentation and geographic information systems (GIS) technologies to the mix of problem solving tools required by communities to make well-informed decisions. Marc has successfully led, managed, and participated in numerous multidisciplinary public projects for library clients nationally and other public agencies, including over a dozen public libraries, the California Department of Transportation (Caltrans), Los Angeles County Metropolitan Transportation Authority, Southern California Association of Governments, and the City of Pasadena, among others.

Marc has previously collaborated with The Ivy Group on projects for Gwinnett County, Des Moines, Milwaukee, and San Antonio.



Qualifications and Experience

About Ivy Library (www.ivylibrary.com)

History

Established 25 ago in Charlottesville, Virginia, Ivy Library—a division of The Ivy Group, Ltd. (www.ivygroup.com)—is focused solely on libraries, library agencies, library publishers, state departments, and library systems.

Principals Pam Fitzgerald and Nancy Davis formed a partnership in 1991, and the firm incorporated in the Commonwealth of Virginia in 1994 and the Commonwealth of Pennsylvania in 2002.

Capabilities

Ivy Library provides the following services to libraries:

- Strategic planning and organizational development
- Market research, including focus groups, community needs assessments, customer satisfaction, new product/program/concept testing, brand equity assessments, executive interviewing, CATI telephone interviewing, mystery shopping, online surveys, site intercepts, database and literature searches, benchmarking, and prospect research
- Communications strategy, branding and marketing communications
- Board and organizational development and training
- Website development and custom technology solutions
- Fundraising and campaign management; advocacy counsel and service
- Public relations counsel and services

Library Expertise

The Ivy Group brings to this project substantial hands-on experience in every aspect of library planning and management—our team includes individuals who hold MLS degrees; have managed public, academic, research, and corporate libraries; have taught library science, and have served as officers of state and national library associations. Their creative and forward-thinking leadership has earned them respect and recognition within the profession.

Led by Partner Nancy Davis, our team has developed strategic plans for many dozens of libraries and library systems across the United States and in Canada. For these projects, The Ivy Group developed qualitative and quantitative research studies, conducted environmental scans, planned



and facilitated meetings, wrote the strategic plan, trained and mentored library leadership, and provided ongoing consultation to library administration and trustees.

We offer a comprehensive menu of planning methodologies to ensure that all stakeholders will be considered in the course of developing the plan. Rather than a “one size fits all” approach to library planning, we incorporate the best features of a variety of models in order to tailor a process to a specific library’s needs.

We are skilled trend spotters and help libraries develop strategies for responding pro-actively to social, economic, technological, demographic, and cultural shifts. In addition, our training and teaching skills ensure that the strategic planning process presents an opportunity for professional growth for staff and trustees. Ultimately, the value we bring to a project is our knowledge, flexibility, and ability to get clients to ask themselves the tough questions.

Locations and Staff

The Ivy Group conducts services from two primary business locations in Philadelphia and Charlottesville:

Main Office
1001 E Market Street
Suite 202
Charlottesville, VA 22902
Tel: 434-979-2678
Fax: 434-979-8433
Email: pfitzgerald@ivygroup.com

Philadelphia Office
1489 Baltimore Pike
Suite 215
Springfield, PA 19064
Tel: 610-544-4040
Fax: 610-544-4055
Email: ndavis@ivygroup.com

The Ivy Group has 10 employees, works with skilled consultants nationally, and makes internship opportunities available to undergraduate and graduate students.

Memberships and Affiliations

- American Library Association
- Public Library Association
- National Organization of Women Business Owners
Nancy Davis is Past President of the Greater Philadelphia Chapter, Chairperson of the NAWBO Greater Philadelphia Foundation for Entrepreneurial Women, and a member of the Foundation of the Delaware County Library System
- American Marketing Association
Pam Fitzgerald is Past President of the Central Virginia Chapter



WBE Certification

A small business with 100% female-ownership, The Ivy Group has achieved national WBE certification.

Presentations, Awards, and Honors

Our team of trainers and facilitators are frequently invited to conduct workshops and make presentations at professional library meetings. Nancy Davis, Pam Fitzgerald, and Catherine Alloway have been featured speakers at the American Library Association, Public Library Association, American Marketing Association, and the North Carolina, Virginia, Maryland, New Jersey, New England, Kentucky, and New York Library Associations.

The firm recently designed and implemented two series of Strategic Planning Boot Camps for the New Jersey State Library's Bureau of Library Development. The Ivy Group's partners and three Ivy Library consultants presented an all-day pre-conference on community assessment at the 2012 PLA Conference in Philadelphia. The Ivy Group also planned and facilitated Library Leadership Ohio's annual three-day leadership institute last year.

The Ivy Group has won the American Heart Association media award and numerous Print Industry Awards of Excellence. Our campaign for the Public Library of Lancaster County received the American Library Association's John Cotton Dana Award for outstanding achievement in public relations. The American Marketing Association has also recognized the quality of The Ivy Group's research and strategic planning work by awarding the firm its Excellence in Marketing on 13 occasions.



Representative Library Strategic Planning Projects

- *Bernards Township Library (NJ)* — Community needs assessment and strategic planning
- *Brooklyn Public Library (NY)* — Community needs assessment:
ivygroup.com/comps/BrooklynSpeaks.pdf
- *Camden County Library System (NJ)* — Community assessment and strategic planning
- *Corvallis-Benton Library (OR)* — Community assessment and strategic planning
- *Cumberland County Library System (PA)* — Community needs assessment and strategic planning: ivygroup.com/comps/CCLSStrategicPlan.pdf
- *DeKalb County Public Library (PA)* — Needs assessment and strategic planning:
ivygroup.com/comps/DekalbStrategicPlan.pdf
- *Des Moines Public Library (IA)* — Community Needs assessment and strategic planning
- *Highlands Regional Library Cooperative (NJ)* — Three strategic planning and training for staff and trustees
- *Hoboken Public Library (NJ)* — Community assessment and strategic planning:
ivygroup.com/comps/HPLStrategicPlan.pdf
- *Indiana Free Library (PA)* — Community needs assessment and strategic planning for all county libraries
- *Loudoun County Public Library (VA)* — Community assessment and strategic planning
- *Montgomery County Public Libraries (MD)* — Needs assessment and strategic planning
- *San Antonio Public Library (TX)* — Community needs assessment, facilities assessment, and strategic planning: mysapl.org/strategicplan.aspx



Other Representative Strategic Planning Clients

Abington Township Public Library (PA)
Adams County Library System (PA)
American Library Association
Bayard Taylor Memorial Library (PA)
Berks County Public Libraries (PA)
Bryant Library (NY)
Chester County Library System (PA)
Commonwealth Libraries of Pennsylvania
Delaware State Department of Libraries (DE)
Fairfax County Public Library (VA)
Fulton County Public Library (PA)
Havertown Free Public Library (PA)
Health Sciences Library Consortium of Pennsylvania
Hershey (PA) Public Library
Jefferson-Madison (VA) Regional Library
Luzerne County Library System (PA)
Lycoming County Public Library System (PA)
Manheim Community Library (PA)
Memorial Library of Nazareth and Vicinity (PA)
Palmyra Area Community Public Library (PA)
Parkland Community Library (PA)
Pennsylvania Community College Library Consortium
Rockbridge Regional Library (VA)
Tulsa City County Library (OK)
University of Virginia Health Sciences Center: The Claude Moore Library
Venango County Public Libraries (PA)
Washington County Public Library (VA)



Scope of Services

The consulting team will:

- Communicate on an ongoing basis with the Library Director and the Steering Committee via telephone, Skype, e-mail, and Basecamp;
- Be on-site for the launch of the project, to facilitate town and staff forums and focus groups, review research, and present the final plan.
- Facilitate a comprehensive analysis of the needs of the Library's service population by means of executive interviews, focus groups, and telephone and online surveys;
- Review and incorporate data from past strategic plans, master facility plans, and City plans as well as the Library's current policies, practices, and service methodologies;
- Conduct an environmental scan, benchmarking, SWOT analysis, and technology and facility assessments;
- Provide a market segmentation analysis at the Library's request;
- Assess the adequacy of the Library' facility, technology, programs, services, operations, and community relationships;
- Identify service and operations gaps and recommend suggestions to better meet the needs of the residents of community;
- Facilitate a strategic planning summit for the Steering Committee and other designees;
- Project future demand for public library services based on community needs, trends in public library service and information technology, and services provided by other community organizations;
- Develop a strategy document that outlines short-term and long-term goals;
- Conduct a facilities overview that identifies service needs and offers building recommendations which will ensure that the Library can satisfy future demands for service;
- Assess the relative roles, responsibilities, and opportunities for synergy and growth for the Library's support organizations;
- Examine financial implications and sustainability of service expansion with respect to current and future capital, operational models and budgets;
- Explore alternate strategies for revenue generation;



- Recommend strategies for promoting the Library's new strategic plan;
- Provide a methodology and tools for measuring milestones, meeting goals, and future planning; and
- Publish a final strategic planning document incorporating survey results and data analysis, research-based recommendations, the facilities and technology overviews, and a priorities timeline.



Work Plan

Stage I: Preparation

The Ivy Group recommends that Placentia District Library launch a phased community assessment and strategic planning initiative based on information gathered from government sources, internal reports, and statistically reliable primary research.

Note: As you consider our proposed approach to the planning assignment, you will see that it includes the use of both qualitative and quantitative research methodologies.

Establishing Lines of Communication

The Ivy Group will provide access to Basecamp, an online, secure, shared project tracking system that enables members of PLD's Steering Committee, project consultants and other designees to see at a glance the status of all activities and shared documents. The Ivy Group also anticipates convening conference calls on a regular basis to maintain communications among members of the consulting team while controlling costs. A member of The Ivy Group's consulting team is based in California and will be available for interim meetings as required.

The Ivy Group will participate in a preliminary conference call with key PLD personnel to confirm project objectives, work product expectations, and timing. Prior to its first on-site visit, the consultants will submit a list of background information (PLD reports, previously conducted research, local planning documents, relevant technology and marketing communications plans and materials, etc.) that we would like to review.

Environmental Scan

The Ivy Group will review trends reports, national reports on technology and public library service, local planning documents, Census data, etc. and develop a presentation on trends which will be presented to Library Trustees and staff as part of the initial visit.

Benchmarking

Benchmarking is a comparison of performance measures between similar entities and/or against recognized standards. It is one of several tools, including customer feedback and outcomes measurement, that libraries, government agencies and non-profits can use to measure performance and assess strengths and areas for improvement.

The consulting team will measure the performance of the PLD against that of five peer libraries and possibly other states. Benchmarking provides an opportunity for the Library to identify areas of excellence and as well as areas of underperformance that may require specific interventions, strategies or further study. The comparisons also provide concrete and persuasive data for advocacy, reports to elected officials, and fundraising.



Selection of peer libraries will be based on demographic indicators for service areas as well as circulation, number of branches, annual budget, and number of visitors or program attendees. Inputs (i.e., government income), outputs (i.e., circulation, reference), and analysis (i.e., cost per circulation) will be compared using the most recent published data from the *Institute of Museum and Library Services* and the *Public Library Data Service*.

The Ivy Group will submit a formal benchmarking narrative with charts to the Library for review.

Stage II: Information Gathering

Initial Site Visit

In conjunction with the first planning meeting, Nancy Davis and Darro Willey will tour the Library and the surrounding community to gather first-hand knowledge of the environment in which the Library provides services. We will also meet with personnel to gather the information about specific areas of Library operations. The agenda for the visit will include meetings with the Steering Committee and the Trustees.

A portion of these meetings will also be devoted to the trends presentation and to developing a SWOT (strengths, weaknesses, opportunities, and threats) analysis of the Library's current performance.

Staff Forum

The initial site visit will also include a forum with PLD staff. The consulting team will make the presentation on trends and conduct the SWOT analysis to gain an understanding of the staff's perceptions of the Library's current performance. The Ivy Group will facilitate a discussion which will provide an opportunity to explain the planning process to staff and afford them a chance to express their ideas about issues which should be addressed in the strategic plan.

The Ivy Group will plan and facilitate the discussion.

PLD will be responsible for:

- Scheduling the meeting; and
- Providing a recorder for the session.

Facilities Assessment

Darro Willey will conduct a facilities assessment to determine the overall condition and adequacy of PLD's existing facilities and to determine the need for new, renovated, or expanded facilities that will best serve the community.

If the research indicates that there are underserved areas or service gaps, the report will recommend locations for an expanded Library presence to address these needs. The assessment



will also evaluate alternate methods of service delivery independent of traditional bricks and mortar.

To develop the facilities report, the consultant will:

- Review existing planning documents, including the previous PLD Strategic Plan and Library statistics, Library Board minutes and budgets, relevant City and County documents, and demographic data;
- Conduct a two-day, on-site survey of existing PLD facilities to assess adequacy of present facilities and the projected need for additional facilities;
- Assess community infrastructure, lifestyle patterns, and transportation network;
- Identify potential community partners;
- Participate in on-site meetings with Trustees/staff/public officials and the public, as needed;
- Provide input on facilities-related issues for research initiatives (executive interviews, telephone surveys, and focus groups); and
- Develop a draft of a facilities plan, make revisions based on input from PLD, and submit the final version of the plan.

Community Forum (Optional)

During the initial visit, the consultant will facilitate a community forum at the Library. The goal is to solicit qualitative, anecdotal public commentary regarding current and future library services. We will explore current levels of satisfaction and ways that participants imagine using their library in the future when considering access, collections, customized services, programs—i.e., what aspects of public library services they appreciate and value, those they would like expanded, and those they think are less important.

In our experience, community forums do not always yield the desired results when considering the amount of time and effort required. Even though libraries promote participation widely, attendance is often very limited. Additionally, the individuals who do come often have their own agendas and use the forum as a platform to promote that agenda. For this reason, we have chosen to make the community forum an optional planning tool.

The consulting team will:

- Develop the discussion guide;
- Assist PLD with strategies for publicizing the community forum;
- Facilitate the public discussion; and
- Prepare an executive summary of findings.



PLD will be responsible for:

- Providing the location for the meeting and publicizing the meeting; and
- Providing a recorder.

Executive Interviews

Executive interviews provide Library leadership with an opportunity for substantive conversations with individuals who influence public opinion in the Library's service area and who can "make things happen" when support is needed. Our clients who have used this information gathering tool attest that it provided them with invaluable insights.

It is our experience that having Library leaders, rather than outside consultants, conduct the executive interviews provides the Library with key opportunities to connect personally with individuals who can become ambassadors for the new strategic plan.

Executive interviews also allow the Library to:

- Gain an understanding of the needs and social, political, economic, and demographic trends affecting the Library's service area;
- Assess the level of awareness of Library services among leaders and the level of support they have among critical constituencies;
- Identify opportunities for the Library to align itself with municipal goals in such areas as educational achievement, economic development, inter-departmental cooperation, customer service, etc., and
- Evaluate the potential for collaborations and partnerships if the needs assessment process suggests that such partnerships would benefit the Library.

Ivy Library will be responsible for the following aspects of the interviews:

- Briefing the Library on the interviewing process;
- Assisting the Steering Committee with researching and developing a list of leaders and "influentials" who should be interviewed (educators, employers and business owners, civic, cultural, and religious leaders, elected officials, journalists, etc.);
- Creating a discussion guide;
- Reviewing submitted reports and preparing and integrating the results of the leadership interviews into subsequent market research activities and the new strategic plan.



The Library will be responsible for the following aspects of the interviews:

- Assisting with the development of the list of prospective interviewees;
- Contacting leaders and conducting approximately 15 interviews; and
- Submitting written reports of the interviews to the consultants.

Quantitative Data Collection/Telephone Survey of Households

A hallmark of our plans is the use of projectable data. While the community forum and focus groups provide an opportunity for open discussion of the Library's future and for garnering favorable public relations, the consulting team recommends collecting quantitative information to make sound management decisions around issues such as program and service expansion and building renovations.

PLD staff and Trustees will have the responsibility of making far-reaching management decisions over the next several years, and it is important to establish this quantitative foundation on which to base and validate these decisions. Statistically reliable information is especially important in making a case with elected officials.

Ivy Library has executed successful telephone surveys on behalf of numerous libraries. An important advantage of the telephone survey is that it allows us to qualify respondents as either library users or non-users and parse the data so as to understand differences between current customers and prospective customers. Our experience also suggests this outreach to residents of Placentia will increase public awareness and understanding of the implications and benefits of expanded and enhanced library services.

The exact scope of the interviews and specific questions would be planned in close consultation with the Library personnel participating in the planning initiative.

Data collected can:

- Measure levels of support for enhanced library services and sustained funding;
- Explore roles that public library plays or could play in their community;
- Determine the level of importance residents attach to having public library services available in their communities;
- Determine current levels of customer satisfaction with specific attributes of library services;
- Measure the potential level of interest in new programs, services, and technologies that PLD might initiate, enhance or introduce in the future;
- Identify differences among important market segments, including families with young children, empty nesters and retirees, etc.;



- Determine current frequency and access patterns;
- Identify barriers that prevent some residents from utilizing library services; and
- Develop demographic profiles of user and non-user populations.

Ivy Library will be responsible for the following aspects of the telephone survey study:

- Designing and translating the survey instrument;
- Training and monitoring the performance of the field research staff; (NOTE: Ricci Telephone Research, the firm which has conducted all of the phone surveys for our library clients, will conduct the telephone survey.)
- Conducting 195 telephone interviews that take 10 minutes or less to administer with adults over the age of 18 in randomly selected households (NOTE: 195 interviews yields a margin of error of +/- 7 % at the 95% confidence level for residents of the service area 18+ years old);
- Providing data entry, coding, editing, and tabulating services; and
- Preparing an executive report of major findings that will be included in the final long-range strategic plan.

Market Segmentation Analysis (Optional)

Market segmentation is a valuable tool for making decisions regarding facilities, collection development, service expansion, and other operational areas. Segmentation that is integrated with library use statistics (such as checkouts by patron) provides a community-wide information system that enables library staff to know who is in their community, who is using the Library, who is not using the Library, and how this information informs strategies for customer development, checkouts and collection development, programs, marketing, partnerships, and use of facilities. Market segmentation is particularly useful when efficiency and effective outreach are top priorities, because the data makes it possible to align strategies and resources to manage a diverse and growing portfolio of customers.

Marc Futterman will consult with the Library and conduct a market segmentation study. A *SnapShot* report will assess the Library's service area from a variety of perspectives:

- *Data at a Glance* — key facts in an easy-to-read table
- *Market Profile* — a range and depth of general demographic information from the Census Current Year Estimate 2010 and a five year population forecast including households, housing by tenure, age, income, race, and educational attainment
- *Tapestry Profiles* — detailed information about the most prominent market segments within the County, including preferences and characteristics of the people in each service area
- *Consumer Expenditure Profile* — pinpointing community interests, preferences, consumer habits, by household, cumulatively, and compared to a national spending index to gauge unique local preferences
- *Business Summary Profile* — identifying fundamental economic needs and interests of the community by ranking the types of businesses and employees in each industry



- Color-coded thematic maps with forecast population, density, and household size and income
- *Executive Summary* — an interpretation of all profiles as a means to identify programs and services to meet future needs

Senior management will be able to identify the specific market segments within their service area as a first step toward allocating collections, programs, and services appropriately.

Focus Groups (OPTIONAL)

We will conduct three (3) focus groups with key target audiences such as parents of young children, teens, representatives of ethnic communities, young professionals, etc. The actual composition of the groups will be decided in consultation with the Steering Committee. While not statistically projectable, focus groups do inform the Library as to how people talk about and respond to various aspects of public library service. Particularly insightful comments can later be woven into the strategic plan.

Ivy Library will be responsible for:

- Consulting on techniques for recruiting and confirming attendee participation;
- Developing focus group discussion guides customized for individual market segments;
- Facilitating the discussions;
- Preparing a summary of findings.
- The Library will be responsible for:
 - Recruiting participants;
 - Providing a discussion venue, refreshments and library-related gifts for attendees; and
 - Providing an individual to take notes.

Research Review and Planning Summit

We will plan and facilitate a 2/3 day meeting with the Steering Committee and other Library designees. The goals of the session will be to review and discuss the implications of the research, reach agreement on what should top priorities in PLD's new strategic plan, and begin to develop steps which the Library would have to take to implement new strategic directions.

Ivy Library would be responsible for:

- Creating an agenda and submitting it for approval to the Director;
- Developing a presentation that details the highlights of the research; and
- Facilitating the discussion about implications of the research and library responses.



Phase III: Implementation

Developing the PLD Plan

The consulting team will craft a series of goals and strategies to support those goals for the planning team's review and approval. The planning team will create action plans around each strategy.

Ivy Library will provide counsel, advice, insights, and recommendations to the planning team as it assembles the work plan.

To keep the plan focused and its objectives achievable, we will encourage the Steering Committee to gauge and prioritize all strategic recommendations by means of a "library initiative litmus test." Clients who want to determine the relative importance of possible new strategies have found that the "test" is an invaluable planning tool:

- Is it a "work smart" concept?
- Does it help market and brand the Library?
- Is it practical and actionable?
- Does it make "best use" of resources?
- Does it address multiple goals?
- Does it provide a favorable return on investment?
- Does it offer opportunities for community partnerships?
- Does it leverage interlibrary opportunities?
- Does it satisfy identified community needs?
- Does it align the Library with City goals and aspirations?
- Does it position the Library and its facility as central to the quality of life in Placentia?

Ivy Library will draft, edit, and design the plan. Upon revisions and final approval by PLD, we will produce 25 bound copies of the plan and provide electronic PDF and Word documents.

We will also consult with the planning team to discuss strategies for publicizing the results and disseminating information about the research and critical components of the new plan to key stakeholders and the general public.



Schedule of Costs

Stage I: Preparation

Establishing Lines of Communication <i>Meeting planning, preliminary conference call, project planning and administration, Basecamp access</i>	\$2,800.
Environmental Scan <i>Document and demographic data review</i>	\$1,200.
Benchmarking <i>Analysis and formal report</i>	\$4,500.

Stage II: Information Gathering

Initial Site Visit <i>Two consultants on-site, meetings with Steering Committee and Board of Trustees, trends presentation, SWOT analysis</i>	\$3,800.
Staff Forum <i>Planning and facilitating staff forum, top line reporting (Concurrent with initial consultation visit)</i>	\$1,850.
Community Forum (Optional) <i>Planning and facilitating community forum, top line reporting (Concurrent with initial consultation visit)</i>	\$1,850.
Facilities Assessment	\$5,200.
Executive Interviews <i>Research, discussion guide preparation, and review of reports</i>	\$1,200.
Telephone Survey of Households <i>List acquisition, questionnaire design, 195 telephone interviews, data entry, tabulations and banners, executive report</i>	\$9,400.
Market Segmentation Analysis (Optional)	\$7,800.
Focus Groups (Optional) <i>Discussion guide development for three (3) focus groups</i>	\$6,400.
Research Review and Planning Summit <i>Facilitation of one 2/3 day meeting with Steering Committee</i>	\$2,800.



Stage III: Implementation

	\$6,200.
Developing the PLD Plan <i>Consulting, writing, design and production of final report</i>	
	\$38,950
MINIMUM PROJECT COSTS	
Travel Expenses*	
First On-site Visit <i>Two consultants</i>	\$1,380.
Second On-site Visit <i>One consultant</i>	\$1,040.
<i>*All travel expenses are estimated and will be invoiced as incurred.</i>	
TOTAL MINIMUM PROJECT COSTS	\$41,370.



References

Mr. Greg Heid

Director
Des Moines Public Library
1000 Grand Avenue
Des Moines, IA 50309
515-283-4152
ggheid@dmpl.org

Ms. Joanne Roukens

Assistant Director
Library Link NJ, The New Jersey Library Cooperative
44 Stelton Road, Suite 330
Piscataway, NJ 08854
732-752-7720
jroukens@infolink.org

Mr. David Belanger

Director
Delaware County Library System
340 North Middletown Road; Fair Acres, Building 19
Media, Pennsylvania 19063-5597
(610) 891-8622
dbelanger@delcolibraries.org

Ms. Jonelle Darr

Executive Director
Cumberland County Library System
19 South West Street
Carlisle, Pennsylvania 17013
(717) 240-6175
jdarr@ccpa.net

Mr. Robert White

Executive Director
Bergen County Cooperative Library System
810 Main St.
Hackensack, NJ 07601
(201) 489-1904
robert@bccls.org



Terms and Conditions

Fees are guaranteed up to 90 days from the time an estimate or proposal is submitted. Approved projects cancelled after work has begun incur a 25% "kill fee." No expense is incurred without client's express advance consent.

Project Timeline

We understand the client requests project completion by the end of March 2014. Upon acceptance, The Ivy Group and the client will determine a mutually agreeable timeline for deliverables for work specified within this contract. The Ivy Group requests a minimum of five (5) business days from receipt of signed contract to commence work.

Invoicing

Our proposed method of payment is as follows. Services will be invoiced in three (3) equal payments at mutually agreeable project benchmarks (TBD). One third is due at signing of contract.

All invoices are payable upon receipt. The Ivy Group reserves the right to assess finance charges at the rate of 2% compounded monthly (26.4% per annum) on any unpaid balance. If an account reaches 90 days past due, services will be suspended for nonpayment.

Out-of-Pocket Expenses

This contract includes miscellaneous "out-of-pocket" expenses, a term used to describe costs for materials The Ivy Group must purchase on the client's behalf from outside sources, as well as travel costs which are invoiced, as incurred, at state rates.

File Ownership

Upon payment of all fees, the use of all research, plans, and design systems approved become the client's exclusive property. All other designs and materials, such as alternate designs, unused research materials, and source files, etc., that are developed in the course of the project shall remain the property of The Ivy Group, Ltd.

The client shall hold The Ivy Group, Ltd., harmless from any action arising from the business practices of the client or its designees. This agreement is governed by the laws of the Commonwealth of Virginia. Reasonable attorney fees and costs shall be awarded to the prevailing party in any action necessary to enforce the terms of this agreement. The Ivy Group, Ltd. is a registered corporation of the Commonwealths of Pennsylvania and Virginia.



Change Orders

Once signed, this proposal will serve as the project contract. Initial planning sessions are critical to the project process, because this is the time when the project's parameters and goals are detailed. As the project proceeds, it may become clear to both parties that additional tasks or revisions in project scope are required. In these cases, a Change Order will be issued. The Change Order will serve as an amendment to the contract, detailing the altered scope and resulting costs.

Acceptance of Proposal

The above proposal, prices, specifications, terms, and conditions for library strategic planning consultant services are satisfactory and are hereby accepted by the Placentia Library District. The Ivy Group, Ltd. is authorized to do the work as specified. Payment will be made as specified.

Once signed, this proposal will serve as the project contract.

Name: _____

Title: _____

Date: _____



Additional Documentation

WBE Certification

Information Gathering Examples:
Executive Interviews Discussion Guide
Focus Groups Discussion Guide
Telephone Survey Script

WBENC
Women's Business Enterprise
National Council

Member

National Women's Business Enterprise Certification

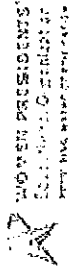
The Ivy Group Ltd.

who has successfully met WBENC's standards as a Women's Business Enterprise. While this certification status for business is widely-recognized, earned and controlled, and is valid through the date herein

WBENC is a 501(c)(3) non-profit organization. For more information, please visit www.wbenc.org.

WBENC Member ID: 02142014
WBENC National Council: 2005109991

Janet F. Eppard



NAICS Codes: 541613, 541630, 541639, 511430, 541610, 541511

UNSPSC Codes: 8112103, 80141614, 80151606

As of 02/14/2014, The Ivy Group Ltd. is a member of WBENC. WBENC is a 501(c)(3) non-profit organization. For more information, please visit www.wbenc.org.

GWINNETT COUNTY PUBLIC LIBRARY
EXECUTIVE INTERVIEWS DISCUSSION GUIDE

Person Interviewed:	_____
Position and Organization:	_____
Date:	_____
Interviewer:	_____

1. Do you or your family use the Library?

What for?

OR

Why not?

2. From your perspective as a leader in Gwinnett County, how would you describe the Library's reputation? (Do you hear people talk about the Library? If yes, what do they say?)

12. The County's 2030 Unified Plan seeks to make Gwinnett County a great place to live, work and play. How can the Library establish its priorities in ways that support the goals of the County's Unified Plan?

13. Do you have any additional thoughts or advice that you would like to share with the Gwinnett County Public Library's Planning Team as it begins its information gathering and comprehensive planning process?

DES MOINES PUBLIC LIBRARY
SAMPLE DISCUSSION GUIDE
FOCUS GROUP STUDY
SENIOR CITIZENS

Good morning/afternoon/evening. My name is _____.

We are very pleased you have agreed to join us today.

The Des Moines Public Library has launched an ambitious project to gain a better understanding of the programs and services the residents of Des Moines want their public library to provide.

We are here to talk about your experiences using your public library. The discussion we are going to have is called a focus group. For those of you who have never participated in one of these sessions, I would like to explain this type of research.

Focus groups are used to gather information from a small group of individuals who have a shared interest in a particular subject—in this instance, programs and services geared to the needs and preferences of seniors.

Our discussion will provide the Library with valuable information about how it can better serve seniors in the future.

In focus groups, there are no right or wrong answers. We want to hear from everyone in the room. Don't hesitate to speak up when you have a point you would like to make.

I will be moderating the session and moving us along so that we touch on all of the key subjects on our agenda. I would like us to avoid getting bogged down on issues

that are not relevant to everyone in the group. If I sense we are spending too much time on one subject, I will step in to keep the discussion moving.

I will tape record this discussion so that I don't have to take notes. I like to follow what is being said and then carefully listen to the tapes later so I can accurately convey your ideas and opinions with the Library.

My role as moderator is to summarize the group's feelings. I will not refer to any participant by name in the report I prepare. The information will be kept confidential and used only by the Library to develop new services and programs that will better address your needs and those of other seniors in the future.

QUESTION 1: I'd like to kick off our discussion by going around the table and having each of you tell the group about yourself—where you live, a little about your family, and anything else you think the rest of us might find interesting.

QUESTION 2: Why do you think it is important to have good libraries in Des Moines?

QUESTION 3: In your opinion, what are some of the most important roles that the Library plays in Des Moines?

QUESTION 4: What changes are taking place in Des Moines that have a direct affect on seniors?

QUESTION 4A: How can your public library respond to these changes?

QUESTION 5: I'd like to talk a little bit about your experiences using the Library. How often do you go there? What are the main reasons that you go?

QUESTION 6: What are some of the programs and services available at the Library?

PROBE FOR:

- *Books*
- *Magazines and newspapers*
- *Reference services*
- *Downloadable e-books and audio books*
- *Computers and online services*
- *Video and audio DVDs*
- *Special programs*
- *Quiet places to read*
- *Online databases*
- *Interlibrary loan*
- *Copy machine*
- *Tax forms*
- *Opportunity to volunteer*
- *Website*
- *Other?*

QUESTION 7: Are there programs and services the Library provides that are specially tailored to the needs of seniors?

- Information for caregivers
- Talking books
- Large print collections
- Assistive technology for individuals with physical challenges
- Internet computer tutorials
- Movies
- Book discussion group
- Information about government programs

- Services to nursing homes, senior centers and residences
- Other?

QUESTION 7A: You have just talked about a lot of programs and services that are available at your library. Of all the ones that have been mentioned, which three are the ones that are most important to you?

QUESTION 7B: What do you think are the best strategies for letting seniors know about the programs and services that the Library has for them?

QUESTION 8: In general, how satisfied are you with the materials, programs, services, and technology for seniors available at the Library?

QUESTION 9: When you come to the Library, do you feel comfortable asking the staff to help you?

QUESTION 10: Do you have access to the Internet in your home?

QUESTION 10A: Have you visited the Library's website? If so, what type of information are you generally seeking?

QUESTION 11: How many of you have used online databases at the Library? How many of you access the Internet at the Library? How important do you think it is for the public library to provide seniors with access to technology?

QUESTION 12: Let's assume that in the future your library could be changed in some way. What would you change or improve?

QUESTION 13: What are the other organizations in your community—such as a senior center—that seniors belong or go to? In what ways do you think Library programs and services differ from those offered by these other organizations?

QUESTION 14: Is there anything else you would recommend that the Library do to provide seniors with better services in the future?

Thank you for your time today. This discussion was very helpful.

DES MOINES PUBLIC LIBRARY TELEPHONE SURVEY

INTERVIEWER: _____
DATE: _____ TIME: _____

Hello. I'm _____, calling on behalf of the Des Moines Public Library. We are conducting a study to learn how the Library can better serve residents of Des Moines. The interview will take about 10 minutes, and only the Library will have access to the information you provide.

1. First, are you a resident of the City of Des Moines?

Yes	1	CONTINUE
No	2	TERMINATE
Don't Know	3	TERMINATE

1A. What is your zip code?

- ___ 50309
- ___ 50310
- ___ 50311
- ___ 50312
- ___ 50313
- ___ 50314
- ___ 50315
- ___ 50316
- ___ 50317
- ___ 50318
- ___ 50319
- ___ 50320
- ___ 50321
- ___ 50322

1B. Are you 18 years of age or older?

Yes	1	CONTINUE
No	2	TERMINATE

DES MOINES PUBLIC LIBRARY TELEPHONE SURVEY

2. Do you have a current card for the Des Moines Public Library?

Yes	1	CONTINUE
No	2	CONTINUE
Don't Know	3	CONTINUE

3. In the last year, approximately how many times would you estimate that you have used the services of the Des Moines Public Library? Please include visits to the Library, calling the Library with questions, or accessing Library information remotely. (ENTER ACTUAL NUMBER AND CIRCLE CODE BELOW.)

#/times _____

0	1	CONTINUE
1 - 2	2	CONTINUE
3 - 6	3	SKIP TO QUESTION 5
7 - 12	4	SKIP TO QUESTION 5
13 - 25	5	SKIP TO QUESTION 5
26+	6	SKIP TO QUESTION 5

4. What is the primary reason you do not use the Des Moines Public Library, or do not use it more frequently? (DO NOT READ LIST. ACCEPT ONE ANSWER.)

I don't have a way to get to the Library.	1
A physical condition prevents me from going.	2
I don't read a lot.	3
I don't have a library card.	4
I have other places to get books, DVD's, etc.	5
I use the Internet instead of the Library to get information.	6
The Library's hours are not convenient for me.	7
The staff is unfriendly / unpleasant.	8
The Library does not have what I need.	9
I use the services of other libraries.	10
I don't have time.	11
I owe money for fines or lost books.	12
The Library is crowded and noisy.	13
The Library is too far away.	15
I can't find a place to park.	16
Other (please specify)	17

DES MOINES PUBLIC LIBRARY TELEPHONE SURVEY

SKIP TO QUESTION 6

5. Which branch of the Des Moines Public Library do you use most frequently?

- Central (Grand Avenue)
- East Side (Hubbell Avenue)
- Forest Avenue
- Franklin Avenue
- North Side (Fifth Avenue)
- South Side Library (Porter Avenue)

5A. If your preferred branch could have its operating hours expanded, when would you most like to see hours added?

- Monday – Friday Evenings
- Saturday
- Sunday

6. There are a number of roles that a public library can fulfill in its community. On a scale of 1 to 5 with 1 being "Not at All Important" and 5 being "Extremely Important", how important is it to you personally that, in the future, the Des Moines Public Library be:

X'D	Not at All	↔	Extremely	
A community gathering place	1	2 3	4 5	DK
A technology center	1	2 3	4 5	DK
A source for reliable information	1	2 3	4 5	DK
A place to borrow books, audio books, movies and music	1	2 3	4 5	DK
An educational support center for people of all ages	1	2 3	4 5	DK
A place for families and children	1	2 3	4 5	DK
A forum for the exchange and discussion of ideas	1	2 3	4 5	DK
A cultural venue for the arts	1	2 3	4 5	DK
A resource for business owners	1	2 3	4 5	DK
A resource for job seekers	1	2 3	4 5	DK

DES MOINES PUBLIC LIBRARY TELEPHONE SURVEY

7. The Des Moines Public Library wants to offer the programs and services that residents value. Please indicate, on a scale from 1 to 5 where 1 is "Not at All Important" and 5 is "Extremely Important", how important it is to you for the Library to offer more of the following in the future? (READ LIST)

X'D		Not at All ↔ Extremely					DK
		1	2	3	4	5	
	Programs, materials and services for pre-school children	1	2	3	4	5	DK
	Programs, materials and services for school-age children	1	2	3	4	5	DK
	Programs, materials and services for teenagers	1	2	3	4	5	DK
	Programs and services for senior citizens	1	2	3	4	5	DK
	Non-fiction materials, such as biographies or history	1	2	3	4	5	DK
	Fiction and bestsellers for adults	1	2	3	4	5	DK
	Computer and Internet training programs and instruction in using other devices such as e-readers, smartphones, etc.	1	2	3	4	5	DK
	Business, career, and employment information services	1	2	3	4	5	DK
	Cultural programs, such as talks by authors and book discussion groups	1	2	3	4	5	DK
	Educational programs	1	2	3	4	5	DK
	Library services and materials available online	1	2	3	4	5	DK
	Comfortable places to work and study	1	2	3	4	5	DK
	Materials for people learning to speak and to read English	1	2	3	4	5	DK
	DVDs and CDs	1	2	3	4	5	DK
	Downloadable materials, such as books, audio books and films	1	2	3	4	5	DK
	More services for mobile and advanced technology users	1	2	3	4	5	DK
	Additional locations for residents who currently do not have convenient access to library services	1	2	3	4	5	DK
	Additional hours	1	2	3	4	5	DK

DES MOINES PUBLIC LIBRARY TELEPHONE SURVEY

8. Please indicate whether you have access to the following technology in your household:

- Desktop computer
- Laptop computer
- Internet access: High speed
- Internet access: Dial up
- iPad or other tablet
- iPhone or other smartphone
- Kindle, Nook or other e-reader

On a scale of 1 to 5 where 1 is "Totally Disagree" and 5 is "Totally Agree", to what extent do you disagree or agree with the following 4 statements:

9. "The Des Moines Public Library plays an important role in the City of Des Moines." (CIRCLE ONE NUMBER BELOW)

1	2	3	4	5
---	---	---	---	---

9a. Why do you say that?

10. "It is important that the Library receive sufficient public funding to provide materials and services that meet the needs of the residents of our community." (CIRCLE ONE NUMBER BELOW)

1	2	3	4	5
---	---	---	---	---

11. "I would support a tax increase to provide for improved or expanded Library services." (CIRCLE ONE NUMBER BELOW)

1	2	3	4	5
---	---	---	---	---

12. "I believe that I am well informed about the programs and services available through the Des Moines Public Library." (CIRCLE ONE NUMBER BELOW)

1	2	3	4	5
---	---	---	---	---

DES MOINES PUBLIC LIBRARY TELEPHONE SURVEY

The following questions are for demographic purposes only.

13. In which of the following age categories do you belong: *(READ)*

18 to 24	1
25-35	2
36-50	3
51-65	4
Over 65	5
N/A	6

14. Please indicate the level of education which you have completed: *(READ)*

Less than 9 th grade	1
9 th – 12 th , with no diploma	2
High school graduate	3
Some college, but no degree	4
Associate degree	5
Bachelor's degree	6
Graduate or professional degree	7

15. Thank you for participating in our study. What other comments, if any, would you like to make about the Des Moines Public Library or the need for additional facilities, services and resources in the future? *(PROBE AND CLARIFY.)*

**END INTERVIEW.
RECORD, BUT DON'T ASK SEX OF RESPONDENT BELOW.**

RECORD SEX OF RESPONDENT	
Male	1

DES MOINES PUBLIC LIBRARY TELEPHONE SURVEY

Female	2
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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: Travel Authorization: Library Staff to attend the Annual California Library Association (CLA) Conference in Long Beach, California from November 3-5, 2013.

DATE: September 11, 2013

BACKGROUND

The California Library Association Conference will be held in Long Beach, California, November 3-5, 2013. The "Let's Make Some Noise" conference will feature keynote speaker, performer, author and activist Henry Rollins. Mr. Rollins has written 15 books including "Before the Chop," "Eye Scream" and "Smile, You're Traveling". He also played in the Black Flag and Rollins Band in the 80's and 90's.

Please refer to Attachment A for the Preliminary Program.

Fiscal Impact: \$3,000

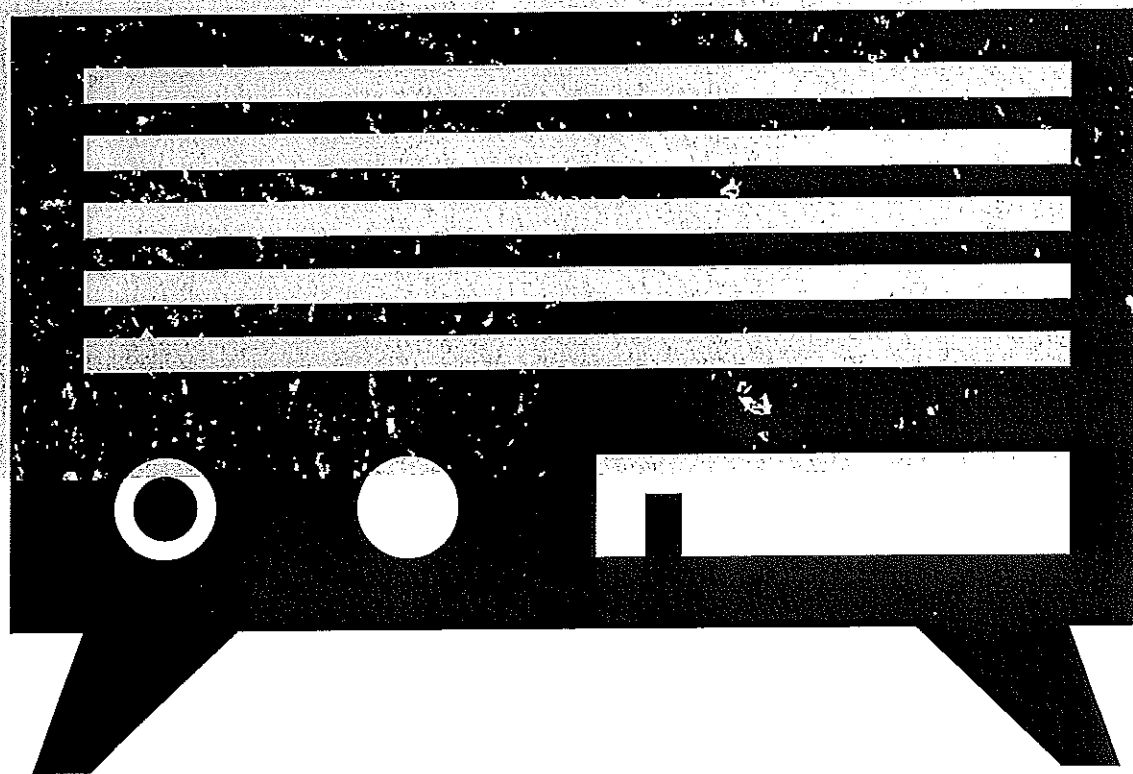
RECOMMENDATION

Authorize six (6) library staff to attend the 2013 CLA in Long Beach, CA from November 3-5, 2013.



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let's make some
NOISE!



CALIFORNIA LIBRARY ASSOCIATION
NOVEMBER 3-5, 2013 • LONG BEACH

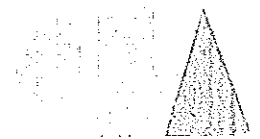
MEMORANDUM

TO: [Illegible]

FROM: [Illegible]

SUBJECT: [Illegible]

[Illegible text follows]



CALIFORNIA
LIBRARY
ASSOCIATION

**FROM THE CLA PRESIDENT
& CONFERENCE PLANNING CHAIR**



Ladies and gentlemen, please put your hands together for... the 115th California Library Association Annual Conference! "Let's Make Some Noise!" is our theme, and we hope to bring that noisy spirit of enthusiasm, celebration, excitement, advocacy, and fun to every element of the conference.

We have assembled a supergroup of over 35 creative and engaged conference committee members representing the full diversity of libraries and library workers in California to make sure the conference strikes a chord with everyone. At the end of last year's conference, you shouted out your requests in the conference evaluations, and we heard you loud and clear.

At its heart, the conference is still an opportunity to celebrate our achievements, network with our colleagues, and learn something new, and these areas of focus haven't changed. However, we've amplified the opportunities for interactivity and creativity in every aspect of the conference.

Our keynote speaker, Henry Rollins, is sure to push the volume up to 11. We are confident that this year's lineup of engaging and dynamic programs and poster sessions, many of which you helped select through crowdsourcing, will be music to your ears. A new energy will infuse the Awards Gala and the Exhibit Hall. The conference will feature enough luncheons, receptions, and social activities to keep you rocking and rolling. You'll be calling for an encore once you realize the show's over!

Be sure not to miss these other hot acts

- Prom
- Scavenger Hunt
- Interactive Exhibits
- Preconferences
- Talent Show
- BattleDecks
- Raffle & Silent Auction

In our experience, what we have gotten out of each CLA conference has been directly connected to how much we put into it. The more you engage, the busier you are. The busier you are, the later you stay up enjoying the company of your amazing colleagues from around the state. The later you stay up, the more tired you are when you get home. And the more tired you are, the more you realize just how much you've learned and just how much fun you've had. This is YOUR conference. We encourage you to dive in, take full advantage, and make it your own. We all have something to learn from each other, so let us hear it. Let's Make Some Noise!

Derek Wolfgram, CLA President
Deputy County Librarian
Santa Clara County Library District

Danis Kreimeler, Conference Planning Chair
Director of Library Services and Community Outreach
Napa County Library

GENERAL INFORMATION

ONSITE REGISTRATION HOURS

SUNDAY | November 3
7:30AM - 5:00PM

MONDAY | November 4
6:30AM - 5:00PM

TUESDAY | November 5
7:00AM - 12:00PM

BYOB

Don't forget your tote! CLA is a Bring Your Own Bag conference.

CROWDSOURCED



Chosen by you! Programs highlighted with the crowdsourcing symbol were among the top 15 vote-getters during the crowdsourcing campaign.

CONFERENCE POLICIES

REGISTRATION & PAYMENT

- Attendees may register online, or by email, mail, or fax. Attendees will receive electronic confirmation when their registration has been processed. If badges are lost and the attendee requests a reprint onsite, attendees may be charged an onsite reprint fee.
- The following methods of payment are accepted for Early Bird Registration and Advance Registration: check, money order, MasterCard, Visa or Purchase Order.
- Purchase Orders will be treated as cash and invoiced. Only checks and credit cards will be accepted for Onsite Registration, and the following credit cards are accepted: Visa, MasterCard, American Express, and Discover. NSF fees will be charged for all checks returned to CLA.
- Attendees must register on or before the dates specified to obtain Early Bird or Advance Registration rates. All registrations received after the dates specified will be charged accordingly. No exceptions.
- Written requests for conference registration refunds must be sent to CLA and must arrive by mail, fax, or email no later than the advance registration deadline. A \$25 processing fee will be deducted from each refund payment. Refunds are not typically issued after the deadline. Appeals may be made to the Executive Director for exceptional circumstances. Refund checks will be processed after conference. There are no refunds for "no-shows."
- Substitutions are permitted. Registration can be transferred to another person if CLA is notified in writing by the original registrant by Advance Registration deadline. There are no substitutions after this time.
- Pre-registration for preconferences is strongly encouraged. On-site registration for preconferences will be available only if there is space in the session. CLA policies on cancellations and refunds apply.
- The member conference rate is for those who hold individual current CLA membership.

NAME BADGES

- Name badges and meal tickets must be picked up onsite at the conference registration desk.
- Conference badges must be worn at all times. Entrance to workshops, conference activities, or Exhibit Hall will not be permitted without the appropriate badge. Lost badges can be reprinted but a small fee may apply.

ATTENDANCE POLICIES

- To maintain a professional atmosphere throughout the conference and exhibit hall, as well as to ensure the safety of CLA members, speakers, personnel, and exhibits, CLA does not allow children under the age of 16 years, including infants, in educational programs, conference activities, or in the Exhibit Hall at any time.
- Your attendance at conference constitutes permission to utilize photos taken of you at the event for news, promotion, and similar purposes.
- Attendance at meal functions, general sessions, and meetings requires conference registration. There are no exceptions to this policy.

EXHIBIT HALL

Our dynamic Exhibit Hall is the place for networking, fun, food and drinks throughout conference. Meet with vendors and explore new library products, services, tools, and technologies. And meet up with friends and take part in our Exhibit Hall events!

Career Resources

Whether you're looking for your first library job or are ready to take the next step in your career, make the Career Resources Booth in the Exhibit Hall your first stop. We have library professionals standing by, ready to:

- review your résumé;
- conduct mock interviews to help you land that perfect position; and
- assist you in developing a job search strategy.

You'll also find information on a variety of current job openings at the booth, and programs on personal and professional development throughout the conference schedule.

CLA Membership Booth

The CLA Membership Booth will be a highlight of the Exhibit Hall. The space will include a performance stage with Ignite Sessions, mini-Battledecks, and musical instruments for everyone to play; a Makerspace to test your creativity; an Innovation Corner where you can check out some of the great innovative projects around the state; a summer reading showcase hosted by our partners, iREAD; and a place to gather, relax, and connect with friends and colleagues. See you there!

Silent Auction

Looking for some fun gifts for the holidays or perhaps a unique gift for yourself? Stop by the Silent Auction to check out all the great packages and support CLA at the same time. Auction items will include gift cards, lunch or dinner with library leaders, vendor prizes, and more! All proceeds from the Silent Auction will go directly to CLA.

Scavenger Hunt

Dust off your magnifying glass, charge your smart phone, practice your puzzling, and begin breeding bloodhounds. This year's Exhibit Hall Scavenger Hunt is here to confound your sleuthing skills and entertain your sense of adventure! Follow the clues from vendor to vendor in this Amazing Race-style game. At each "check-in" you'll receive your next clue. Engage in a unique task at the check-in for additional points. Complete the race and your name will be entered into a drawing to win fabulous prizes. And with additional points your name will be entered more times! Bring your smart phone or borrow someone else's for a chance to interact with fellow contestants along the way. First clues may be picked up at any time from the CLA booth. May the odds be ever in your favor!

The Grand Opening Reception is sponsored by Califa.

EXHIBIT HALL HOURS

SUNDAY | November 3
4:45PM - 6:30PM

MONDAY | November 4
10:00AM - 5:00PM

TUESDAY | November 5
9:00AM - 2:00PM

NO CONFLICT HOURS

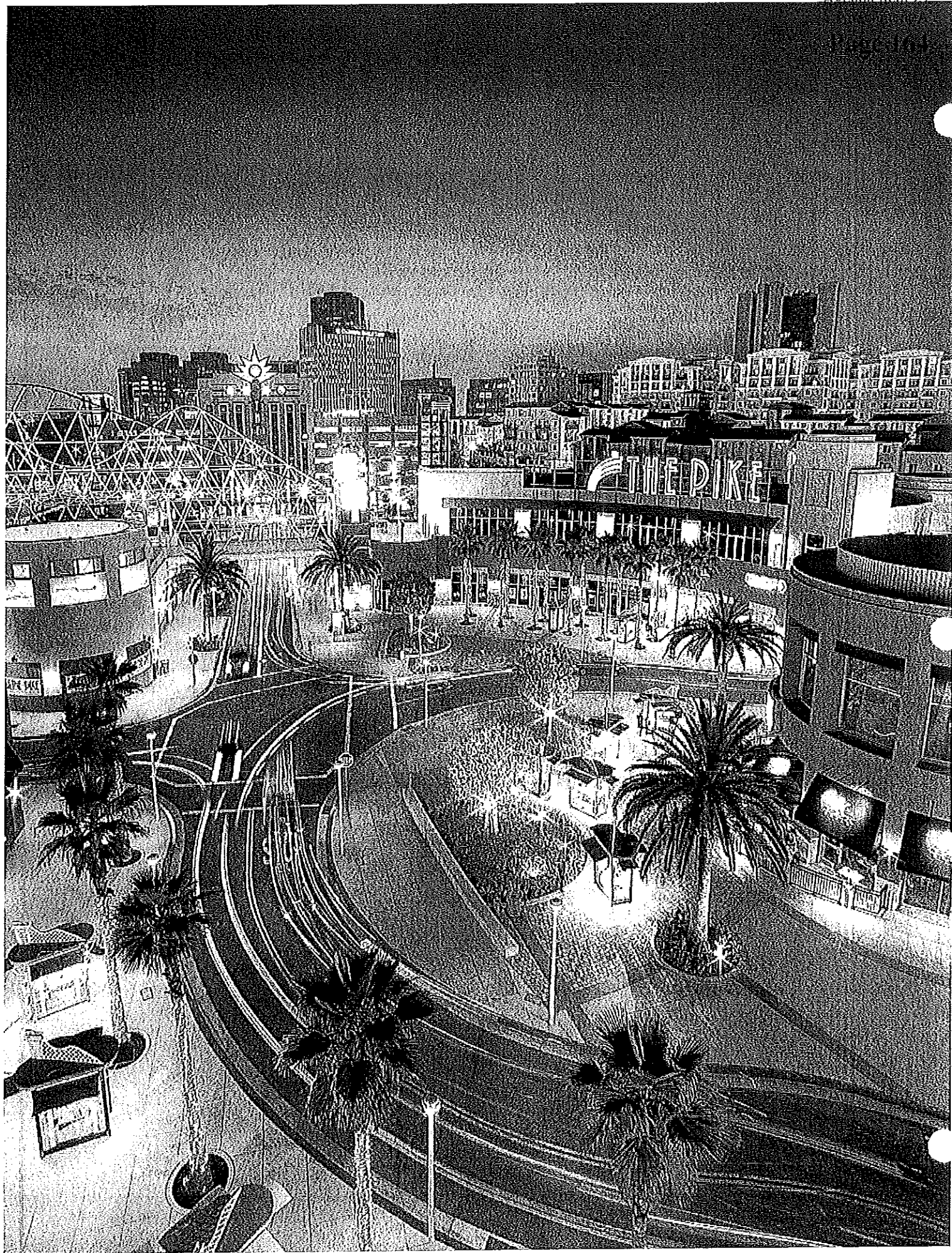
SUNDAY | November 3
4:45PM - 6:30PM

MONDAY | November 4
2:00PM - 2:45PM

TUESDAY | November 5
9:00AM - 10:15PM

RECEPTIONS

Join us in the Hall for our Grand Opening Reception on Sunday evening, afternoon tea on Monday, and breakfast on Tuesday morning.



Long Beach welcomes the California Library Association and invites you to MAKE SOME NOISE!

Situated only a block from the beautiful downtown waterfront, the Long Beach Convention Center is walking distance from over 100 quality restaurants, coffee shops, wine bars, ale houses, shopping, entertainment, and attractions. Shoreline Village offers casual and fine dining with a view of the tall ships floating in the harbor, and The Pike and Pine Avenue have everything from a Dueling Piano Bar and multi-screen theaters to classic Irish pubs and excellent Argentinian fare.

Present your conference badge at the Aquarium of the Pacific after 2:00pm to visit for only \$8! (Regular price \$25.99.) The Aquarium has more than 11,000 animals representing the diversity of the Pacific Ocean, and visitors can interact with sharks and rays, feed lorikeet birds, touch sea jellies, visit the new Penguin Habitat, and more!

Downtown Long Beach is a quick ride on the free Passport Shuttle to the regal Queen Mary and the Scorpion Submarine and a variety of tour options; a beautiful hour cruise away from Catalina Island offering everything from zip-lining to spa experiences; and a short distance from Disneyland, Universal Studios Hollywood, and all southern California has to offer!

Visit the Local Arrangements table at the Convention Center for advice on eating and drinking on the town, travel options in the city, tour suggestions, and anything else that would make your experience in Long Beach noise-worthy. We love our city and we are here to SHOW IT OFF!

HYATT REGENCY LONG BEACH

The luxurious Hyatt Regency Long Beach, adjoining the Convention Center, is our conference hotel. The largest waterfront hotel in the City of Long Beach, the Hyatt is steps away from walking, jogging, and bike paths on the beach. Features include a fitness center, heated outdoor pool, self-service business center, and wireless Internet access. Food served in the hotel restaurant is from natural, local, and sustainable sources. The Hyatt has just completed a \$30 million renovation, and its elegant and modern guestrooms offer views of the beach, harbor, and city skyline.

Hotel Rates & Reservation Information

To book your stay at the Hyatt Regency Long Beach, please visit:
<https://resweb.passkey.com/go/CALibrary2013>

Standard Room Rates

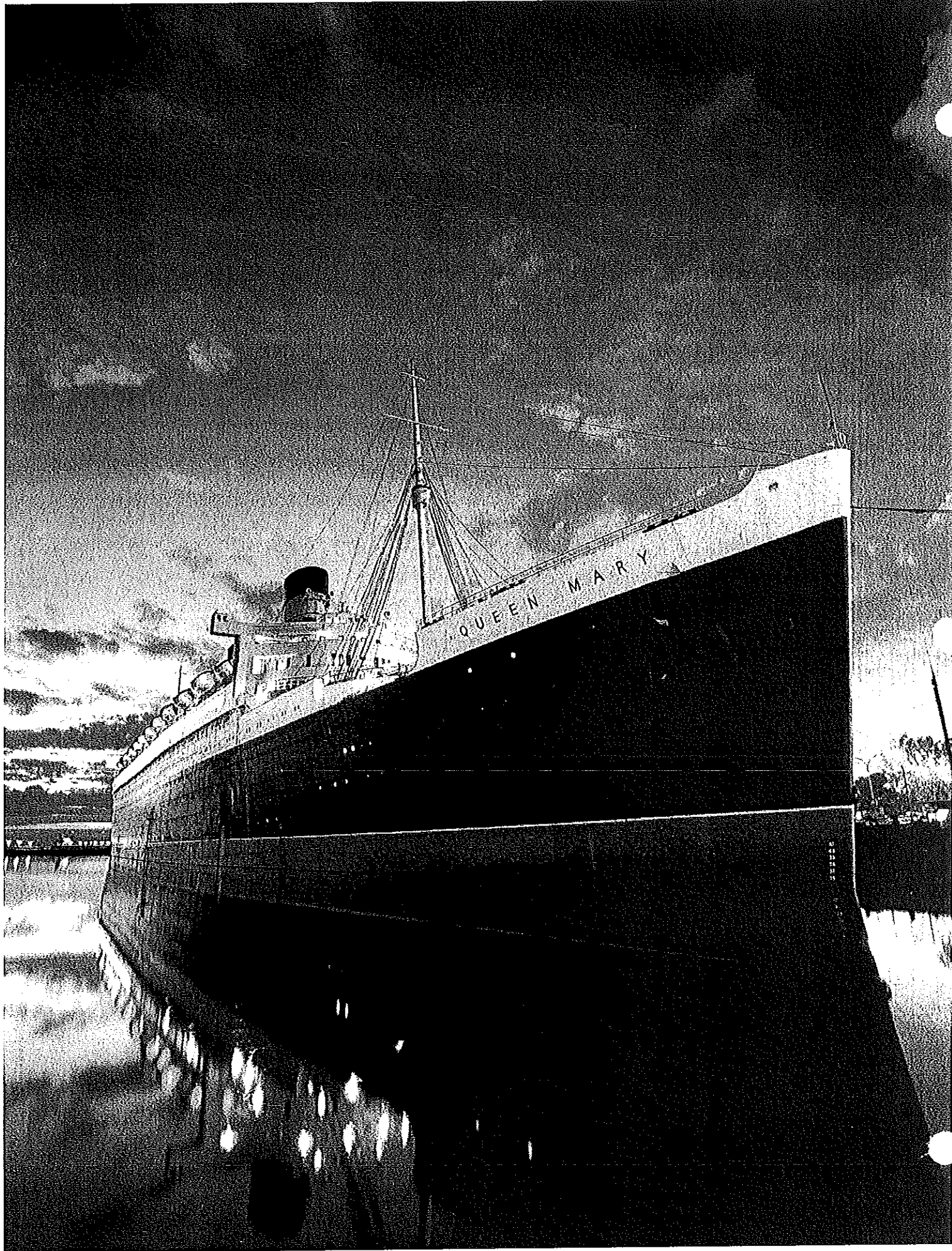
Room type	Single	Double	Triple	Quadruple
Standard	\$139.00	\$139.00	\$164.00	\$189.00

Additional per night

Harbor view	\$20.00
Business plan	\$30.00
Regency Club	\$60.00
Executive King	\$150.00

Room rates do not include applicable state & local taxes and assessments.

Photo Credit: Destinations Magazine-pikev4resized



SPECIAL EVENTS, LUNCHES, & MEETINGS

SUNDAY, NOVEMBER 3

Tour the Queen Mary

Sunday, November 3 | 11:00AM
Hyatt Regency Long Beach Lobby
Registration Fee: \$25

Join your fellow CLA noise makers for a fun afternoon of camaraderie and culture, and we'll throw in a big boat too!

Meet in the lobby of the Hyatt Regency at 11:00am for coffee and chitchat before boarding the free Passport Shuttle for a short 15 minute ride to the regal Queen Mary. Once there, the group will be given comprehensive self-guided audio tour headsets and we'll set off to explore the amazing sights and sounds of this great ship. As we listen to the stories behind the pictures and the artwork of the legendary ship, and learn about everything from her groundbreaking construction to her royal launch, we'll get to know the real Queen Mary up-close and personal. Also included is the Ghosts and Legends Show.

We can stay on the boat and have a drink at the Art Deco Bar, chowder at Chelsea's Chowder House, or a simple sandwich at the Midship Marketplace, or we can head to downtown for a meal before the Grand Opening of the Exhibit Hall at 4:45pm.

Legislative Luncheon

Sunday, November 3 | 11:45AM-1:15PM
Registration fee: \$50

Join CLA's Advocacy and Legislation Committee Members and CLA Board Members at the annual CLA Legislative Luncheon, and get the latest information on legislative issues affecting libraries. Updates will be presented on important legislation such as SCA 7 (Wolk) and SB 331 (Liu).

CLA Awards Gala

Sunday, November 3 | 7:30PM - 9:30PM
Hyatt Regency Long Beach
Registration Fee: \$75

Join us in celebrating this year's award winners at the annual Awards Gala. Our theme is "Prom Night!" So dust off your poofy dresses (or your elegant dress) and your tuxedos (or that nice suit), put those dancing shoes on, and come along! We'll recognize the amazing accomplishments of our colleagues and give you the best time you've had a CLA conference. Don't miss it!

CLA PROM

Sunday, November 3 | 10:00PM - Midnight
Hyatt Regency Long Beach
Registration Fee: \$25

In the mood for dancing but can't make it to the awards ceremony? Come along to the Awards Gala after-party, a.k.a. the CLA Prom, and dance into the night!

Photo Credit: Destinations Magazine-Queen Mary bow at sunset

SPECIAL EVENTS, LUNCHESES, & MEETINGS

MONDAY, NOVEMBER 4



California State Library Breakfast

Monday, November 4

Registration Fee: \$20

Breakfast is Back! Start your day bright and early, with hearty food, good companionship, and the latest news from the State Library.



Opening Session & Keynote Speaker: Henry Rollins

Monday, November 4 | 8:30am-10:00am

Long Beach Convention Center

We're delighted to announce that the keynote speaker for the 2013 California Library Association in Long Beach will be Henry Rollins. Henry is the perfect speaker for our conference theme of "Make Some Noise!" His thoughtful, insightful, and entertaining commentary on social issues can be found across multiple media.



Barb Rosenstock

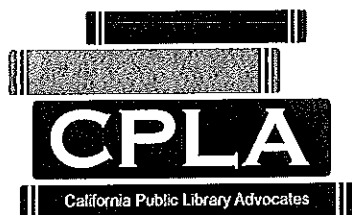
Mordcai Gerstein

Beatty and California Young Reader Medal Luncheon

Monday, November 4 | 11:30AM-1:00PM

Registration Fee: \$50

Please come along for a celebration of this year's Beatty and CYRM award winners. We will be joined by author Barb Rosenstock and Caldecott Award-winning illustrator Mordcai Gerstein, Beatty Award recipients for *The Camping Trip that Changed America*. And we will honor Ally Condie, the Young Adult category winner of the California Young Reader Medal for her novel *Matched*. Attendees will enjoy great conversation and a delicious lunch overlooking the stunning Long Beach Harbor. We hope to see you there!



CPLA Awards Luncheon

Monday, November 4 | 11:30AM-1:00PM

Registration Fee: \$50

Join the California Public Library Advocates (CPLA, formerly CALTAC) as they honor the 2013 CPLA Award winners! CPLA recognizes its members, library supporters, library Friends and Foundations as part of its continuing efforts to help improve library services in California.

Let's Make a Splash at the Aquarium of the Pacific

Monday, November 4 | 4:30PM - 6:00PM

Aquarium of the Pacific | 100 Aquarium Way, Long Beach, CA 90802

RSVP to lbplevent@gmail.com to attend this free event

You "otter" join the Long Beach Public Library, Friends of LBPL and the LBPL Foundation to make some noise and friends at the Aquarium of the Pacific. This free event will feature an afternoon of people and animal encounters, light appetizers and a no-host bar.

SAVOR Watershed classroom and gardens. The Watershed building is a LEED® Platinum certified green design, construction, and operations. A fully functioning carbon-neutral classroom, this building also serves as an example of alternative energy use, sustainable design, and water conservation and reuse. You are also welcome to explore the Aquarium of the Pacific beyond this event with a special CLA discounted rate.

Interest Group & Committee Meetings

Monday, November 4 | 5:00PM

CLA Interest Groups and Committee meetings. Full details will be available in the fall.

Battledecks meets Librarians Got Talent

Monday, November 4 | 9:00PM

Battledecks, or PowerPoint Karaoke, is a fast-paced laugh-fest where contestants give a presentation on the fly as slides are randomly projected for their confusion and your delight! This year, we're upping the ante by adding a talent show! In between decks, you'll be entertained and amused by your brilliant colleagues as they show off their hidden skills. Fear not, there will be no baton twirling or swimsuit contest.

Contestants will be judged through a combination of audience participation and a panel of low-level celebrities who can be bought. If you're interested in showcasing your gift for talking about subjects you know nothing about, or your other awe-inspiring talents, please contact Jennifer Baker at jennifer@shpl.org (subject line: Battledecks/Talent Show).

LIBRARY SCHOOL RECEPTIONS

San José State University

Monday, November 4 | 6:00PM - 7:30PM
Hyatt Regency Long Beach

Is the San José State University School of Library and Information Science your alma mater? Are you a current student at SJSU SLIS? Thinking about earning your degree at the SJSU information school? You're invited! Our school is hosting a reception at the California Library Association conference. Meet your instructors and mingle with your peers. There will be complimentary hors d'oeuvres and plenty of good conversation. The reception is free and no RSVP is necessary. We hope to see you in Long Beach, CA!

University of California, Los Angeles

Monday, November 4 | 6:30PM - 8:00PM
Bubba Gump Shrimp Co.

Imagine studying information science alongside the leading experts in the field in a program with top-flight resources, facilities, and 50 years of excellence. Imagine no more: this is the UCLA Department of Information Studies. Join us as we host a reception for alumni, students, faculty, and prospective students at the Bubba Gump Shrimp Co. restaurant in Long Beach. There is no cost to attend and there will be complimentary appetizers. For more information contact us at (310) 206-0375 or by e-mail at alumni@gseis.ucla.edu. We look forward to seeing you there!

University of Southern California

Monday, November 4 | 6:00PM - 7:30PM
Hyatt Regency Long Beach

Join Dr. Ken Haycock, director of USC's new online Master of Management in Library and Information Science, and research professor of management and organization in the USC Marshall School of Business, for a reception and brief information session. USC is the first major research university in more than 30 years to invest in librarianship as a profession for the future. USC is also the first university to develop its degree from the ground up as a program within its business school. The USC program is fully online and offers both a general approach and a focus on academic librarianship, digital librarianship, or libraries in urban environments. We emphasize leadership development across all tracks. The USC MMLIS is accepting applications for spring and summer 2014 cohorts.

SPECIAL EVENTS, LUNCHESES, & MEETINGS

TUESDAY, NOVEMBER 5



CALIFORNIA
LIBRARY
ASSOCIATION

Membership Meeting

Tuesday, November 5 | 8:00AM - 9:00AM
Long Beach Convention Center

CLA's annual Membership Meeting is where you want to be on Tuesday morning! Your CLA Treasurer will present information on the association's financial health, your CLA President will give a brief overview of the association's accomplishments during his term, and your incoming president will announce her presidential theme! Louis Fox, CEO of CENIC, will give an overview of the CENIC project that will bring high speed internet connectivity to the California public library community!

Movers, Shakers, and Noisemakers!

Tuesday, November 5 | 4:00PM - 5:00PM
Long Beach Convention Center

Christy Aguirre, Sacramento Public Library; Kenn Bicknell, Dorothy Peyton Gray Transportation Library, Los Angeles County Metropolitan Transportation Authority; Milly Lugo, Santa Ana Public Library; Michelle Perera, Rancho Cucamonga Library Services.
Moderated by Cindy Mediavilla, California State Library

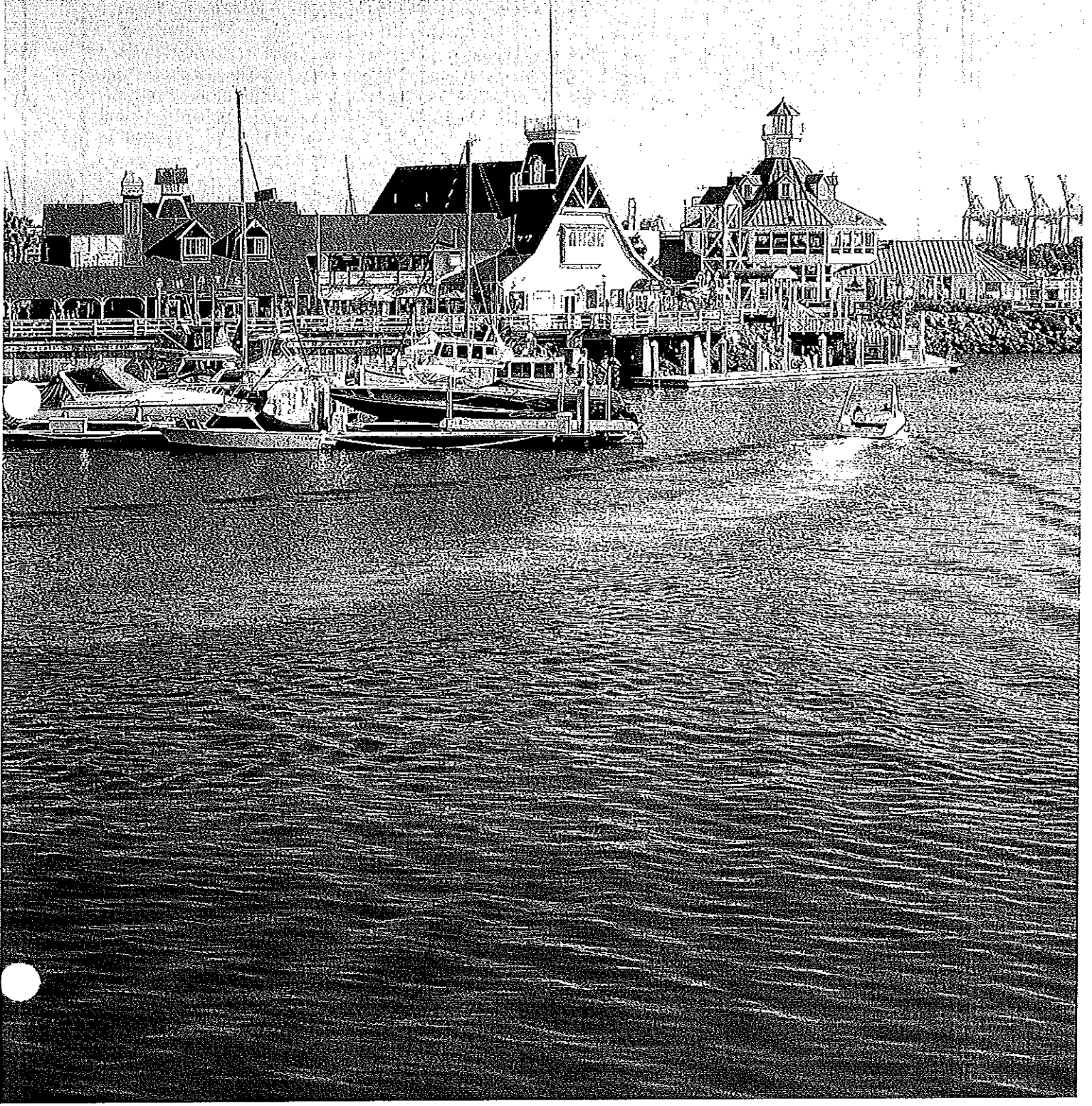
End conference on a high-note with California's most recent *Library Journal* Movers and Shakers. Cindy Mediavilla will lead an inspiring and revealing discussion on what it means to thrive in leadership. Leave conference ready to do some moving and shaking yourself!

**LIBRARY
JOURNAL.**

OCLC Luncheon

Date and Time to be determined.

Don't miss the OCLC Update Luncheon! Full details to follow in the Final Program.

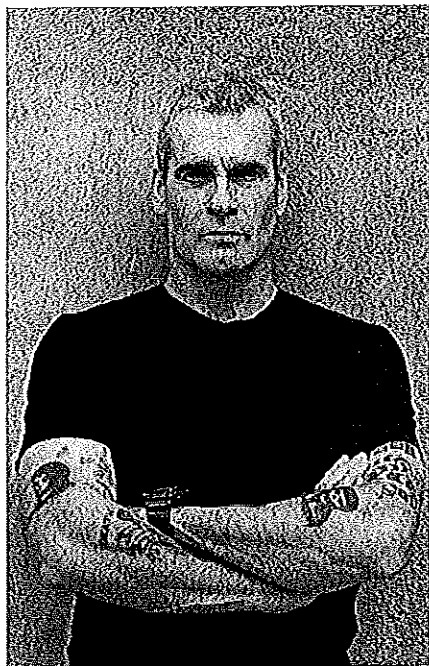


FEATURED SPEAKERS

HENRY ROLLINS

Opening Session & Keynote Speaker

Monday, November 4 | 8:30am-10:00am Long Beach Convention Center



Henry Rollins, poet, singer, author, photographer, actor, raconteur, and all round Renaissance man will open conference and inspire us all to "Make Some Noise!"

Henry's thoughtful, insightful, and passionate commentary on social issues can be found across multiple media. Originally best known as the singer for the seminal southern California punk rock band Black Flag, from 1981 to 1986, and the Rollins Band in the decade that followed, he has also released over a dozen spoken word albums in which he shares his commentary on a host of social and political topics. He has published fifteen books of journals, poetry, autobiography, and photography, including 1992's *Black Coffee Blues*, 1994's *Get in the Van: On the Road with Black Flag*, and most recently, 2011's *Occupants*, a collection of photographs from around the world paired with essays about the world condition, which *wired.com* called "an impressive collection built entirely out of Rollins' desire to expose readers to corners of the world they may otherwise never see."

Henry hosts a weekly radio program on KCRW in Los Angeles, writes regularly for the *LA Weekly*, has acted in the television program *Sons of Anarchy* and in numerous films, and hosted *The Henry Rollins Show* on IFC for two seasons. He tours with the USO to support and entertain American troops overseas. Henry is a popular speaker on social justice topics, spending more nights per year on the road than he does at home.

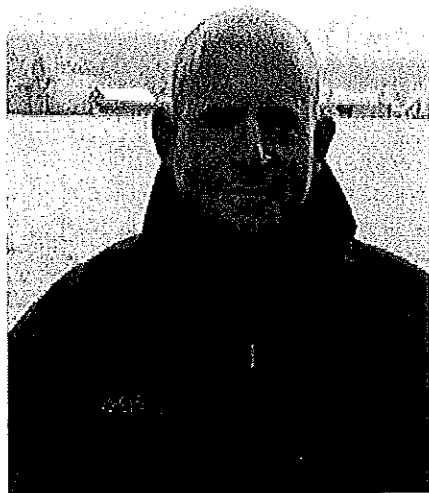
Henry Rollins is energetic, inspiring, and challenging, and we are delighted to welcome him to our 115th CLA conference!

You can follow Henry on twitter at @henryrollins.

LOUIS FOX

Membership Meeting

Tuesday, November 5 | 8:00AM - 9:00AM
Long Beach Convention Center

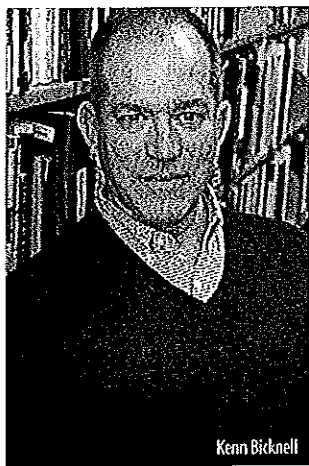


Louis Fox is President & CEO of the Corporation for Education Network Initiatives in California (CENIC), a non-profit corporation that represents the common interests of California's education and research communities in achieving robust, high-capacity, next-generation Internet communications services. Prior to joining CENIC a year ago, Louis served for nearly three decades as a faculty member, researcher, and senior administrator at the University of Washington and at Duke University. CENIC provides networking services to the University of California campuses, California's major private colleges (charter members: Caltech, Stanford, USC), all California State Universities, all California Community Colleges and satellite sites, and the entire California K-12 community. Over 10,000 institutions and 10 million students, faculty, teachers, and staff use the CENIC network every day. We hope, very soon, that California's public libraries will be among the communities served by CENIC.

Movers, Shakers, and Noisemakers!

Tuesday, November 5 | 4:00PM - 5:00PM
Long Beach Convention Center

Christy Aguirre, Sacramento Public Library, Kenn Bicknell, Dorothy Peyton Gray Transportation Library, Los Angeles County Metropolitan Transportation Authority; Milly Lugo, Santa Ana Public Library; Michelle Perera, Rancho Cucamonga Library Services.
Moderated by Cindy Mediavilla, California State Library



End conference on a high-note with California's most recent *Library Journal* Movers and Shakers. Cindy Mediavilla will lead an inspiring and revealing discussion on what it means to thrive in leadership. Leave conference ready to do some moving and shaking yourself!

CHRISTY AGUIRRE | 2013 Mover and Shaker, Community Builder
"Almost immediately after joining Southgate in spring 2012, Aguirre, who has been with the Sacramento Public Library since 2008 (and before that spent seven years in the public libraries of San José), initiated partnerships with dozens of local businesses, city organizers, and public and private agencies to offer grant-funded programming and workshops to increase literacy across all ages and abilities... For these initiatives, Aguirre was named the 2012 Outstanding Librarian in Support of Literacy by the California Library Association."¹



KENN BICKNELL | 2013 Mover and Shaker, Advocate
"He has made the Metro Transportation Library a leader in deploying online tools and technology to bring library resources to users, says Matthew Barrett, Archives and Records Management administrator for the county Metropolitan Transportation Authority. Bicknell's work at Metro has raised the library's national profile and serves as a model for other small libraries and other cultural institutions in the Los Angeles region, Barrett says."²

MILLY LUGO | 2012 Mover and Shaker, Advocate
"Since she joined SAPL in 2007, she's made a point of helping Spanish-speaking adults follow their own dreams by gaining essential skills for living and working in the digital age. Lugo developed a grant-funded "Words for Work" workshop to teach employment-related English and provided "English Works"

self-directed learning kits to help students prepare for English as a Second Language (ESL) classes. Especially popular is the computer literacy class she created."³

MICHELLE PERERA | 2013 Mover and Shaker, Change Agent

Perera led her team in developing "'Play and Learn Islands' that have become wildly popular at Rancho Cucamonga and beyond in the past few years. These interactive, multimodal educational exhibits for children under seven—"Discovery Dig," "Make It Move," "Big Build," and "IlluminART"—incorporate problem-solving, sorting, sharing, early literacy skills, design and testing, creativity, and collaboration. Perera, who taught for eight years at San José State University's library school, is also breaking new ground with staff development. The two-part Staff Innovation Fund she created for her own library team includes training in grant development and project management followed by actually submitting a grant proposal. (Her staff has won ten grants.) The California State Library is now piloting the program at four other libraries."⁴

¹Christy Aguirre | Movers & Shakers 2013 — Community Builders." *Library Journal*. N.p., n.d. Web. 11 June 2013.

²Kenn Bicknell | Movers & Shakers 2013 — Advocates." *Library Journal*. N.p., n.d. Web. 11 June 2013.

³Milly Lugo | Movers & Shakers 2012 — Advocates." *Library Journal*. N.p., n.d. Web. 11 June 2013.

⁴Michelle Perera | Movers & Shakers 2013 — Change Agents." *Library Journal*. N.p., n.d. Web. 11 June 2013.

YOUR CALIFORNIA STATE LIBRARY AT CONFERENCE

DON'T MISS CSL AT CONFERENCE

The California State Library is everywhere at this year's conference!



Be watching for the specially marked programs featured throughout the conference. The State Library's logo indicates a program about a successful project supported through Library Services and Technology Act (LSTA) funds.

CALIFORNIA STATE LIBRARY BREAKFAST

Monday, November 4

Registration Fee: \$20

Breakfast is Back! Start your day bright and early, with hearty food, good companionship, and the latest news from the State Library.

These sessions are in addition to three invitation-only workshops being offered by the State Library at the start of conference:

California Library Literacy Services

Our new annual CLLS Literacy Coordinators and Library Directors' Orientation will take place the morning of Sunday, November 4. Contact Carla Lehn at Carla.Lehn@library.ca.gov for more information.

CALIFORNIA LIBRARIES + RECESSION = CREATIVITY

The State Library will be providing public library directors an opportunity for networking to discuss common issues and ideas as well as the results of a study on the impact of the recession on public libraries and the lessons learned. Contact Darla Gunning for full information: Darla.Gunning@library.ca.gov.

EXHIBIT HALL

And don't forget to visit our booth in the Exhibit Hall! We love to chat and hear what's going on around California!

Early Learning with Families at the Library

Starting this summer, the California State Library will launch Early Learning with Families at the Library, an LSTA-supported initiative that brings together public library leaders who are working to help encourage and support the continued evolution and enhancement of library services for babies, toddlers, preschoolers, their parents, and caregivers. A preconference workshop, November 1-3, will feature Joshua Sparrow, MD of the Brazelton Touchpoints Center, as well as an early learning community partners panel, a panel discussion on the wise use of technology with young children, and experiential sessions on music, art, movement, and play. Co-sponsors are the CLA Youth Services Interest Group and Lakeshore Learning. Participation is by application only. For more information, please contact Suzanne Flint at Suzanne.Flint@library.ca.gov or 916-651-9796.

CONFERENCE AT A GLANCE

SUNDAY | NOVEMBER 3, 2013

07:30AM REGISTRATION OPENS
 08:30AM PRE-CONFERENCE WORKSHOPS
 11:00AM QUEEN MARY TOUR
 11:45AM LEGISLATIVE LUNCHEON
 01:30PM PRE-CONFERENCE WORKSHOPS
 04:45PM EXHIBIT HALL OPENING
NO CONFLICT TIME 4:45PM-6:30PM
 07:30PM CLA AWARDS GALA
 10:00PM CLA PROM

TUESDAY | NOVEMBER 5, 2013

07:00AM REGISTRATION OPENS
 08:00AM MEMBERSHIP MEETING & SPEAKER
 09:00AM EXHIBIT HALL
NO CONFLICT TIME 9:00AM - 10:15AM
 10:15AM PROGRAM SESSIONS I
 11:45AM PROGRAM SESSIONS II
 12:30PM POSTER SESSIONS
 01:45PM PROGRAM SESSIONS III
 03:00PM PROGRAM SESSIONS IV
 04:00PM MOVERS, SHAKERS, & NOISEMAKERS!
 CLOSING SESSION

MONDAY | NOVEMBER 4, 2013

06:30AM REGISTRATION OPENS
 CALIFORNIA STATE LIBRARY BREAKFAST
 08:30AM OPENING SESSION & KEYNOTE SPEAKER SESSION
 10:00AM EXHIBIT HALL OPEN
 10:15AM PROGRAM SESSIONS I
 11:30AM LUNCHEONS
BEAUTY & GYM / CRA
 11:30AM POSTER SESSIONS
 01:00PM PROGRAM SESSIONS II
 02:00PM EXHIBIT HALL
NO CONFLICT TIME 2:00PM - 2:45PM
 02:45PM PROGRAM SESSIONS III
 04:00PM PROGRAM SESSIONS IV
 04:30PM LET'S MAKE A SPLASH
THE AQUARIUM OF THE PACIFIC
 05:00PM INTEREST GROUP & COMMITTEE MEETINGS
 06:00PM LIBRARY SCHOOL RECEPTIONS
SJSU / UCLA / USC
 09:00PM BATTLEDECKS MEETS LIBRARIANS' GOT TALENT



PRE-CONFERENCE WORKSHOPS

SUNDAY | NOVEMBER 3

PROGRAM LEGEND



California State Library



Crowdsourced

Basic Cataloging with RDA

Sunday, November 3 | 8:30AM - 4:30PM

\$90 non-members; \$65 members; \$50 student members

Chamya Kincy, UCLA; Luiz Mendes, CSU Northridge

RDA, the new cataloging standard, was implemented by the Library of Congress on March 31, 2013, and California librarians are now challenged to implement and integrate RDA into their local catalogs. This workshop will offer a basic introduction to cataloging with RDA, will focus on print monographs, and will cover both description and access. Attendees will participate in hands-on exercises which will include use of tools and documentation in support of cataloging with RDA.

Attendees will access the latest national documentation on policies, decisions, best practices, and training materials related to RDA. Through guided participatory exercises they will gain the knowledge, skills, and confidence needed for the effective implementation and integration of RDA into the fabric of their libraries.

Chamya Kincy is the Life & Social Sciences Cataloger, Cataloging & Metadata Center, UCLA. She has served as the Medical Library Association's liaison to the ALCTS CaMMS Committee on Cataloging: Description & Access. She has also served on the ALCTS CaMMS RDA Implementation Task Force and currently serves on the ALCTS CaMMS RDA Conference Forums and Programs Task Force.

Luiz Mendes is the Electronic Resources Librarian at CSU Northridge and past President of Southern California Technical Processes Group (SCTPG). He also serves as a member of the ALCTS CaMMS RDA Implementation and Training Task Force and is a national trainer for the Library of Congress Cataloging for the 21st Century metadata courses. Luiz is an adjunct faculty member in the UCLA Department of Information Studies, teaching graduate courses on descriptive and subject cataloging.

Sponsored by the Technical Services Interest Group. Co-sponsored by the Chinese American Librarians Interest Group

It's All About THEM! Getting Your Library's Role in the Community Right

Sunday, November 3 | 8:30AM - 11:30AM

\$60 non-members; \$45 members; \$30 student members

Craig Gerhart, Gerhart Enterprises, Inc.,

Whether you're working on a community-wide initiative, proposing an annual budget, or just want to make sure you have a seat at the table, it helps to know what makes city and county officials tick. By recognizing the value of establishing relationships with your local officials, developing the skills needed to participate effectively in those relationships, and understanding how to build professional trust, you'll be better positioned to talk to power and help build sustainable communities that improve lives.

Craig Gerhart is President of Gerhart Enterprises, Inc., a management consulting firm specializing in organizational development and analysis, leadership development, strategic planning, and executive coaching. His work with the International City Management Association (ICMA) includes participation in the Edge Coalition, a Gates Foundation funded initiative developing benchmarks and assessments of library technology access and community connection.

Prior to the formation of Gerhart Enterprises in July 2009, Gerhart capped a 32-year local government career by serving as County Executive of Prince William County, Virginia, for nearly ten years. During his tenure, Prince William achieved a AAA bond rating, attained citizen satisfaction ratings for County services of 90%, and developed an organization in which 94% of employees were proud to work for the County. He has received numerous awards and recognition for his service including the outstanding regional leadership award from the Metropolitan Washington Council of Governments.

Sponsored by Infopeople

Paws to Read: California Summer Reading Program ☒

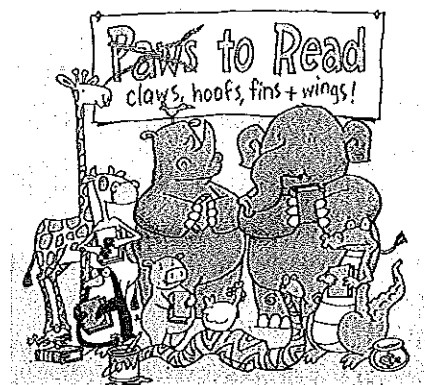
Sunday, November 3 | 1:00PM - 4:30PM

Free of charge but registration is required

Natalie Cole, California Library Association; Jill Donovan, iREAD; Lori Easterwood, Sacramento Public Library; Jill Harris, San Rafael Public Library; Anna Hartman, San Diego County Library; Nicole Powell, Sacramento Public Library; Courtney Saldana, Ontario City Library; Susie Serrano, Butte County Library; Celeste Steward, Alameda County Library; Sarah Vantrease, Butte County Library; Laurie Willhalm, Oakland Public Library

Please join us for CLA's annual summer reading training workshop. We will showcase creative programming, decorating, and outreach ideas for pre-school, children's, tween, teen, and adult summer reading programs—all inspired by the 2014 animal theme, Paws to Read. Attendees will have the opportunity to participate in small-group discussions and hands-on craft stations, win Paws to Read Incentives, and brainstorm ideas for the 2016 summer reading slogan. You will also be invited to display your best summer reading logs, flyers, posters and other materials, and browse samples from around the state, in our new Show-and-Tell area.

Sponsored in part by ScholarShare/TIAACref

**SCHOLARSHARE**

CALIFORNIA'S 529 COLLEGE SAVINGS PLAN

Clamoring for Service Excellence! California Library Literacy Programs: Let's Make Some Noise! ☒

Sunday, November 3 | 1:30PM - 4:30PM

\$60 non-members; \$45 CLA members; \$30 student members

This lively pre-conference will focus on two key topics:

Raising the Roof for Tutor Training: An interactive panel discussion of the pros and cons of various approaches to tutor training including traditional face-to-face training; "Just in Time" training; on-line training; and combined delivery. Experts in the various delivery methods will highlight their successful (and not-so-successful) experiences as well as sharing tips for orchestrating positive changes into your program.

Moderated by Carla Lehn, CLLS

As a library programs consultant for the California State Library, **Carla Lehn** assists libraries with volunteer, board, and community development issues, and also serves as the staff person for California Library Literacy Services. In addition, she leads a statewide library volunteerism initiative: Get Involved: Powered by Your Library. Driven by research on how baby boomers' interests are changing the face of volunteerism, the project's dual purpose is to recruit high impact volunteers to share their skills to engage them as strong library supporters. Carla's well-versed passion regarding the vital role of quality training for volunteers is sure to stimulate rich insights.

Let the Rumpus Begin! Building a Better Collection: A dynamic discussion by librarians, literacy professionals and book sellers about how to build a strong literacy collection. Included will be tips on weeding, how to buy appropriate materials and how best to shelve in order to make your collection as useable, meaningful and friendly as it can be.

Moderated by Amy Crepeau, Huntington Beach Public Library

Amy Crepeau has coordinated the Family Literacy Program at Oak View Branch Library since 1997 and is now just over the halfway mark earning her MLIS through San José State University. Amy loves looking at and hearing the varied materials available for adult literacy and ESL students, and finding the right material to meet the needs of learners is an ongoing quest. As she has fallen victim to purchasing the "miracle" teaching resource that turns out not to be so miraculous, Amy promises to be a moderator fully engaged in the topic.

Sponsored by the Literacy Interest Group and the Southern California Library Literacy Network (SCLLN), one of eight regional library literacy networks comprising California Library Literacy Services, a program of the California State Library.

PROGRAMS & POSTERS

PROGRAM LEGEND



California State Library



Crowdsourced

SESSION I | 10:15AM - 11:30AM

MONDAY | NOVEMBER 4

California Writers Panel: Paws to Read

Lisze Bechtold; Kristine O'Connell George; Doug Hansen; Erica Silverman; with Mary Menzel, California Center for the Book

The 13th annual California Writers Panel presents, for the first time, children's authors and illustrators. Author-librarian Erica Silverman, poet Kristine O'Connell George, author-illustrator-animator Lisze Bechtold, and author-illustrator Doug Hansen have all created works that feature animals, and so the 2014 summer reading theme, Paws To Read, will be our focus. The panelists will discuss the particular joys and challenges of writing about animals, of using animals as protagonists, and of bringing animals to life in illustrations. They will also demonstrate their work and join the audience in small group sessions to advise about careers and creative approaches. This is a rare opportunity to get to know four professionals of awesome creativity.

Sponsored by the California Center for the Book, the Collection Development Interest Group, and the Youth Services Interest Group

Here's the Money: Cultivating Individual Donors for Your Library

Kary Bloom, San José Public Library; Judy Klikun, San José Public Library

Are you wondering how to increase revenue? Would you like funding that is unrestricted, ongoing, and growing? Join San José Public Library's Partners in Reading to discover options for increasing revenue through individual donor development. Giving USA has reported that individual donors contributed 73% of an estimated 290.89 billion dollars in 2010. Let's tap that resource! Learn where to focus your energies and how to develop an effective plan to cultivate donors, solicit contributions, and build commitment. Have fun identifying and sharing simple opportunities that can begin the process of soliciting donations. Get practical tips for creating tools that communicate your message effectively. Discuss the findings of this LSTA project and begin designing your plan. Leave this interactive session with resources galore: a sample plan from San José, and templates, tools, and strategies that you can use to cultivate your individual donors.

Sponsored by the Literacy Interest Group

RDA: Resource Description and Access: An Update

Chamya Kincy, UCLA; Luiz Mendes, CSU Northridge

RDA, the new cataloging code, was officially implemented by the Library of Congress on March 31, 2013. How does this impact California libraries? The program will provide an update on recent national developments in policy and practice, and suggest strategies for local implementation and integration of RDA.

Sponsored by the Technical Services Interest Group

Now We Can Dance: How Three Librarians, a Group of Teens, and a Few Professional Consultants Produced a Documentary Film

Sally Thomas, Hayward Public Library; Laurie Willis, Hayward Public Library; Keith Wilson, Walleye Productions

Hayward Public Library took the California State Library's Digital Story Station project to the next level to produce a 30-minute documentary film about a community event, the Hayward Gay Prom. The film is a shining example of how a library can go beyond its traditional role of curator, and create information that documents significant aspects of the community and brings young and old together in a conversation about an important community issue. The film, *Now We Can Dance: The Story of the Hayward Gay Prom*, is the culmination of a two-year project, funded by Cal Humanities, which trained teens to be filmmakers with help from a team of librarians and professional advisors. The film screening will be followed by a Q&A session and the opportunity for attendees to brainstorm about how they might become creators of content in their own communities.

More Straight Talk, the Directors Speak

José Aponte, San Diego County Library; Julie Farnsworth, City of Pleasanton Public Library; Laurel Prysiazny, Fresno County Public Library; Rivkah Sass, Sacramento Public Library; Jeff Scott, Tulare County Library

Where are libraries going? What does it take to become a director? Hear from the great masters about how they deal with the current state of libraries. Get great advice, hear inspirational stories, and find out what it takes to lead the profession. Jeff Scott, moderator, will ask five library directors five questions. With the combined knowledge of those who have reached the upper echelon of their library careers, you will hear the straight talk about where we are now and where we are going. Come be inspired by these oracles of the library profession.

Sponsored by the Management Interest Group

Staff Innovation Fund ☒

Robert Karatsu, Rancho Cucamonga Library Services; Danis Kreimeier, Napa County Library; Gerry Maginnity, California State Library; Michelle Perera, Rancho Cucamonga Library Services

Join us for a discussion about Staff Innovation Fund, a grant-funded program that first trains staff in grants, project management, communication, creativity, branding, and management, and then opens up an innovation fund for participants. Participating libraries include Napa County, Sonoma County, St. Helena, Pasadena, Palos Verdes, Torrance, and Kern County. Representatives will talk about their experiences, their projects, and training. Join us to hear some fun new project ideas and what an innovation fund can do for your library!

Stand Out and Be Outstanding: Fearlessly Leading Your Library Career ☒

Yemila Alvarez, San Francisco Public Library; Martha Camacho, Pasadena Public Library; Cen Campbell, LittleLit.com; Dolly Goyal, San Mateo County Library; Genesis Hansen, Mission Viejo Public Library; Patrick "PC" Sweeney, San Mateo County Library; Allison Tran, Mission Viejo Public Library

What does it mean to lead and be recognized as a leader in the library profession? And what exactly is a rock star librarian? This session will spark a discussion about what it means to stand out—and be outstanding—in the library field. A panel of motivated librarians who have participated in California's Eureka! Leadership Program and the ALA Emerging Leaders Program will share innovative paths to leadership, including strategies for being a leader in any position, risk-taking, and balancing personal and professional priorities. The panel will engage participants in a candid discussion of seeing the big picture in your library career; standing out from the crowd and why visibility matters; being a rock star—help or hindrance; and haters gonna hate—dealing with backlash. Join us to gain ideas for cultivating your leadership role in the library field, and sound off about what you think defines a library leader.

What Kind of Noise Are You Making? 🗣️

Sophia Duran, San José State University; Arglenda Friday, San José State University; Kristen Rebmann, San José State University; Sharon Tani, Le Cordon Bleu College of Culinary Arts; Patty Wong, Yolo County Library; Beth Wrenn-Estes, San José State University

Members of San José State University SLIS's Diversity Committee are making some noise about the importance of diversity in libraries. Arglenda Friday will discuss how to "Customize Your Diversity Checklist" with a checklist she uses in the classroom, and will suggest ways librarians can use the instrument to gauge how well diversity is being supported in their institutions. Patty Wong will address the six most common diversity issues affecting public libraries today, including staff development, internship programs to promote diversity, and developing skills and talents of librarians from diverse backgrounds. And panel members Kristen Rebmann, Sharon Tani, Sophia Duran, and Beth Wrenn-Estes will discuss their experiences with diversity issues and the library profession in 5-minute lightning talks. Participants are encouraged to bring their own stories to share.

POSTERS | 11:30AM - 12:30PM

Asian/Pacific American Librarians Association (APALA): Sharing Stories, Sharing Culture

Jade Albuero, APALA; Susan Minobe, UCLA

The Asian/Pacific American Librarians Association (APALA) is dedicated to supporting APA librarians, those serving APA communities, and library services to APA communities. This session highlights notable APALA programs, such as the APA Awards for Literature, Talk Story: Sharing Stories, Sharing Culture, and What's Your Normal? It aims to provide information about APALA and its work and share resources that could be used for APA-centered services.

PROGRAMS & POSTERS

PROGRAM LEGEND



California State Library



Crowdsourced

MONDAY | NOVEMBER 4

Asian/Pacific American Literature and Resources: There's an APALA for That!

Jade Alburo, APALA; Young Lee, University of LaVerne College of Law; Lessa Pelayo-Lozada, Glendale Public Library

The Asian/Pacific American Librarians Association (APALA) introduces a web application that aggregates and highlights APA literature, authors, and resources. Using resources from two APALA programs, APA Awards for Literature (APAAL) and Talk Story: Sharing Stories, Sharing Culture, as starting points, the app gives users easy access to recommended resources by creating different access points (e.g., title, subject, author) and offers multiple modalities, including different interfaces tailored to different users (e.g., children, parents, librarians, and teacher). The web app can easily be turned into a native app for multiple devices or platforms. This poster includes information on the history of APAAL and Talk Story, designing and building the web app, marketing, and impact.

Attuning to Their Differences: Implications of Demographics and Prior Library Experiences on Student Confidence

Emily K. Chan, San José State University; Valeria Molteni, San José State University

Confidence is important to student success and is partially dependent upon previous experiences and achievements. Does this concept apply to libraries and information literacy? That is, does previous library use predict higher levels of confidence in performing research-related tasks? Are there connections between ethnicity, gender and information literacy confidence? Our poster will highlight a study in which undergraduate students were asked to describe the types of library experiences that they had had prior to an information literacy session. The demographics of the student population were also collected and students' information literacy confidence was measured. Student confidence was correlated to other demographic aspects, including gender, ethnicity, and first generation college student status. Understanding the role that prior experiences with libraries, regardless of type, may have on the maintenance, progress, and growth in information literacy is significant. It encourages librarians to consider how their particular program contributes to their users' continuing development in information literacy.

Celebrating Diversity and Community Year-Round: An Academic Library Reaches Out

Rachel Myers, UC San Diego; Gayatri Singh, UC San Diego; Dortehea Stewart, UC San Diego

Traditionally, academic library outreach targets the campus. This poster focuses on how the UC San Diego Social Sciences & Humanities library's outreach program develops exhibits and events that make diversity a cornerstone while drawing on the rich resources of the library, our campus, and the wider community. Attendees will leave with an understanding of how to develop diversity in exhibits and events, how to identify community partners, and how to link outreach efforts to the library's mission.

Celebrating the Year of the Library

Gail McPartland, Contra Costa County Library; Ian Richards, Contra Costa County Library

To celebrate the 100th birthday of the Contra Costa County Library, we embarked on a multifaceted approach to festive community events, programs, and an online retrospective. The library used birthday celebrations to highlight community partnerships and expand connections to city, county and state stakeholders. The library has a history of developing leading-edge services such as Discover & Go, Snap & Go and Library-A-Go-Go which continue to be showcased in community events and birthday programs.

DMV Test Prep: You Should Do It!

Valentine Llord, Beaumont Public Library; Lucy Sims, Beaumont Public Library

This poster will offer you the opportunity to learn how to develop a DMV Test Prep class in your library or community. You will receive information on how to acquire free DMV Handbooks and other materials, and receive a copy of a press release and sample copies of the public relations materials we use to promote the program. You will also have the opportunity to take a test and score it, and receive sample tests to take away.

Filipino American Library: Outreach via the WWW

Florante Peter Ibanez, Filipino American Library; Elnora Kelley Tayag, Filipino American Library

By combining theory, practice, and research, this project created a partnership between the Filipino American Library, the UCLA Asian American Studies Center, and the UCLA Information Studies Program. The Filipino American Library (FAL) in Los Angeles is a relatively unknown jewel in the Filipino Los Angeles community with few visitors per week. Over the past few years, an enhanced, colorful, interactive website has been developed, highlighting the library's rare collections, primary source materials, and calendared community programs. The site also incorporates links to other appropriate community resources both locally and nationally so that the FAL can serve as an important information & knowledge portal for the Filipino American community of Los Angeles and others. With this new & cool visibility, potential library patrons and researchers will be tempted to visit the upcoming satellite site of the FAL at the Echo Park Library in collaboration with their newly developed Philippine Heritage Collection.

Free Websites for Literacy Tutoring

Marian Thatcher, Sacramento Public Library

Are you tutoring adults, teens or kids and need some fresh ideas and activities? This session will demonstrate a variety of free websites that provide practice with spelling, grammar, reading, listening, and math. Some are online games, others offer printable worksheets. You might create a spelling list online and have your students practice the words using online games before they take the spelling test. Or they might read a news story that has been adapted for low readers, discuss it with you, and then do some vocabulary and comprehension activities online. If you're working on math, find out about several sites that provide math practice at every level. Whatever you're looking for, you're bound to get some new ideas here!

LAMP: Building Networks and Collaborations

Amani Ayad, University of Illinois

The LIS Access Midwest Program (LAMP) has developed a model that provides pathways for students from historically and statistically underrepresented groups as they pursue their MS degrees in library and information science (LIS). The program is designed to strengthen and reinforce the leadership and professional skills of students interested in the field of LIS by providing mentoring, internships, professional development opportunities and scholarships. LAMP supports a community of diverse students who learn together, exchange insights and experiences, and, as they graduate from their LIS programs, form a network of dedicated library professionals. Key to LAMP's fresh approach is the collaboration between LIS schools and academic libraries that have similar goals and vision. This poster session will demonstrate LAMP's multifaceted approach and provide a visual map of the program. The LAMP model can serve as a guide to other organizations and institutions interested in promoting awareness of the field of LIS and collaborating to enhance diversity efforts. LAMP is supported by IMLS.

Let's Buy Some eBooks!

Alejandra Nann, University of San Diego

This poster will take an in-depth look at the cycle for eBook acquisitions. Like many other libraries, the Copley Library is looking to move away from eBook subscription leases. Yet, the thought of purchasing eBooks can be daunting. Budgets, vendors, and packages are all components to take into consideration. By giving a quick overview of the process, our poster presentation will give library staff an understanding and even some ideas on how to conquer eBook acquisitions.

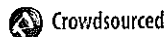
Library Reorganization: How to Keep Your Ruby Red Slippers on the Yellow Brick Road!

Julie Moore, Fresno State University; Kimberley Smith, Fresno State University

Wizard of Oz icons will be used to explore the ins and outs of navigating a library reorganization. Presenters will focus on key components of a successful library reorganization that will keep the participants and their ruby red slippers on the Yellow Brick Road.

PROGRAMS & POSTERS

PROGRAM LEGEND



Making a Big Difference with Just a Little

Margo Smart, San Diego County Library

If you're wondering how to expand your teen services, come and learn about teen-led international service projects and how to inspire your library teens! The San Marcos Branch Library Pennies for Peace and Roots & Shoots groups inform and inspire young people to create inexpensive, viable projects that engage their consciousness and their community beyond their city limits.

Training (and Fun) with SC Scavengers & LC Jeopardy!

Adam Sexton, University of Southern California

Want more effective student assistants? Trying to get a new employee up to speed? Just like library trivia? Come see how we added fun to training at the USC Libraries. Laptops will be provided so that individuals or teams can participate in a round of Library Jeopardy for prizes. The higher your score, the more you win! Bring your colleagues and your thinking caps.

What's Your Normal? A Dialogue and Brainstorming Session on Diverse Identities and Realities

Jade Albuero, APALA; Melissa Cardenas-Dow, University of Redlands; Cynthia Mari Orozco, Loyola Marymount University

Last year, the Asian/Pacific American Librarians Association (APALA) launched What's Your Normal?, a new essay series that highlights the diversity (e.g., ethnicity, language, religion, sexuality, (dis)ability, citizenship, socioeconomic status) within the Asian/Pacific American cultural category, and offers snippets of what is "normal" for the writers, as well as resources on each topic. This poster broadens the conversation and provides a forum for constructive dialogue. Using personal narratives as the starting points, our poster will not only create awareness about individual realities and identities and discuss them within larger social contexts, but will also serve as a space for sharing and brainstorming best practices, practical ideas, and potential programmatic curricula. The intent is to incorporate and curate some of the stories and ideas into an open-access publication that can be used by library professionals to further understanding and appreciation for all kinds of diversity. So, what's your normal? Let's talk!

SESSION II | 1:00PM - 2:00PM

Amp Up Your Library Experience

(Choose Your Own Adventure-style)

Robert Karatsu, Rancho Cucamonga Library Services; Michelle Perera, Rancho Cucamonga Library Services

Tired of sessions where the speaker has control over the session? Then come along to this program where you can choose your own adventure! Join the 2013 National Medal-Winning Rancho Cucamonga Public Library where they will propose topics relating to amping up your public's, staff's, and stakeholders' library experiences (such as dreaming big, chasing \$, celebrating success, getting your interactivity on, experiential programming, marketing and branding, and more) and you, the audience, will choose the topics and the direction we will go in. We may cover ten topics or only one—the choice is yours! Disclaimer: this might be one of the best programs you attend or you might walk out en masse, but either way, let's talk about making some noise at our libraries!

Career Vision: A New Approach for Job Seekers and Career Changers in the Public Library

Jamie Beck, Career Vision; Vera Skop, Inland Library System

Through this fun and entertaining analytical journey you will learn first-hand the struggles the unemployed in our communities face on a daily basis and how (with LSTA funding and through a unique partnership between Career Vision and the Inland Library System) Career Vision 2013 is reshaping the way public libraries in the Inland Empire are serving the unemployed. Learn about this model, why it works, what we learned, and how your library can become a hub for community partnerships to address unemployment. Our presenter, Jamie Beck, will have you laughing, head-nodding, and wondering where she was when you were 18. Her approach is innovative and thought-provoking, and you will see why her programs have been so very popular. Come open-minded and ready to explore how job and career workshops can be motivational and fun and bring new customers to your library.

Comic Book Petting Zoo: The Best Graphic Novels of 2013

Jack Baur, Berkeley Public Library; Amanda Jacobs Foust, Marin County Free Library

Get down and dirty with the best graphic novels of 2013! Two veteran graphic novel collectors will share their favorite releases of the year for children, teen, and adult collections. They are trucking the books all the way down from the San Francisco Bay Area so that YOU can get your hands on them! Browse our favorite titles, suggest your own, ask questions about graphic novel collections, and meet other aficionados!

MONDAY | NOVEMBER 4

Engaging Community NOISE. Positioning Public Libraries as the Ideal Partner in Broadband Access and Implementation

Connie Barrington, Imperial County Free Library; Linda Crowe, Califa; Derek Wolfram, Santa Clara County Library District; Patty Wong, Yolo County Library

Speakers will discuss their respective roles in engaging partners in broadband implementation and development beyond service enhancement. Linda Crowe will discuss library consortia working with CENIC to bring stronger connectivity to northern CA public libraries. Derek Wolfram will talk about CLA's behind-the-scenes work with legislators and lobbyists to advance the library's role in stronger broadband access and networking. Connie Barrington will discuss her experience as a representative to the San Diego Imperial Counties Consortium charged with expanding broadband access and adoption to the Imperial Valley community. And Patty Wong will discuss the library as an active partner in technology development planning, focusing on Yolo County's Broadband Summit and the pursuit of grant funding for infrastructure support to address county economic development needs.

The Real World: The True Story of Life After Library School Graduation

Doug Cordell, LACMA; Lessa Kanani' opua Pelayo-Lozada, Glendale Public Library; Simon Lee, UCLA; Natalie McCall, Marin County Free Library; Cielo Botello-Williams, Windward School

Still haven't found your dream job? Recent graduates from public libraries, academic libraries, and special libraries share their struggles, surprises, and successes in beginning to build a career in today's difficult and crowded job market. From their stories, learn how to be creative in job searches, juggle multiple part-time jobs, build a résumé while looking for employment, and how to discover unexpected opportunities through networking.

Sponsored by the UCLA Career Forum Series

Sailing on a Cloud: How Cloud Computing is Mobilizing in Libraries!

Adam Sexton, University of Southern California; Win Shih, University of Southern California

Cloud computing has gone from being a promising technology to a reality. USC Libraries migrated its Integrated Library System to cloud-based software as a service environment in 2011. Combined with mobile technology, we are now using mobile devices to perform our operations, including inventory, self-reading, and circulation transaction. Come along and find out what we're doing!

Training? What Training? Or, How We Totally Reinvented Our Staff Training Program (And How You Can Too!)

Laura Gravander, Contra Costa County Library; Maureen Kilmurray, Contra Costa County Library; Bill Kolb, Contra Costa County Library; Gail McPartland, Contra Costa County Library

Contra Costa County Library has developed a replicable employee training model that builds organizational capacity while capitalizing on the knowledge and expertise already existent in the organization. We'll share our training model and templates, relate successes, identify pitfalls, and engage in an interactive session where we, as a group, will follow the steps and actually develop a training module.

Wise Ways to Use Media & Technology with Young Kids

Cen Campbell, LittleLit.com; Suzanne Flint, California State Library; Shira Lee Katz, Common Sense Media; Carisa Kluver, Digital-Storytime.com; Kristen Torres, El Dorado County Office of Education/ First 5

In this session, a panel representing experts from Common Sense Media, Little eLit, First 5, and Digital-Storytime.com will explore wise ways to recommend and use technology with young children. They will talk about the importance of adult-child interactions and limited screen time for kids 0-2. They'll then introduce you to exceptional learning media for older children, and great ways to engage in child-adult co-play, touching on key technology issues such as multitasking and a healthy media diet. Attendees will be armed with concrete ideas about how to select great media for young children, and how to use new media in thoughtful, age-appropriate ways. A Kids Tech Toolkit, newly developed by the State Library, will be announced and shared.

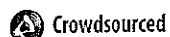
Vamos a hacer ruido! Taking Services to Spanish Speakers to the Next Level

Jennifer Baker, St. Helena Public Library; Norma Ferriz, St. Helena Public Library; Mari Martinez, St. Helena Public Library

Whether you're starting from scratch or need to breathe new vida into your Spanish language services, this program will give any library, regardless of size, tips, tools, and ideas to use when identifying and meeting the needs of local Spanish-speaking users (and potential users). Staff and volunteers from the St. Helena Public Library will share with you how, and why, they built a successful Spanish language services program in just six months. Learn what they have done so far and how their work continues to evolve and improve, resulting in a muy divertido programa.

PROGRAMS & POSTERS

PROGRAM LEGEND



SESSION III | 2:45PM - 3:45PM

A Conversation about eBooks: An Inclusive Critique of eBook Service Models, Vendors, and Publishers

Mildred Arenciba, Marin County Free Library; Henry Bankhead, Los Gatos Public Library; Mark Coker, Smashwords; Amanda Jacobs Foust, Marin County Free Library

Attendees will acquire a practical understanding of how two systems are approaching ongoing eBook issues, including both their successes and failures, with a special focus on acquisition models, self-publishing, and collection development. This session will widen librarians' horizons in relation to the potential benefits of self-published eBooks for readers, authors and libraries, and will propose a model by which libraries can easily become content creation spaces through partnerships with self-publishers.

Sponsored by the Technology Interest Group

Effective Advocacy in Five Easy Steps

Jane Cronkhite, Santa Clara County Library District; Mark Fink, Santa Clara County Library District

Learn how the Santa Clara County Library District is teaming up with key stakeholders, including Friends, Foundations, and Library Commissioners, to showcase the library's value as an essential asset in each of the district's communities. Find out how we have created a compelling story that resonates with its target audiences and why this is critical for the development of an effective advocacy plan.

Getting Creative at California's County Law Libraries: Partnerships, Programs, and More

John Adkins, San Diego Law Library; Renee Fleming, Santa Cruz County Law Library; Annette Heath, Kern County Law Library; Lawrence R. Meyer, San Bernardino County Law Library; Dolly Moehrl, Ventura County Law Library; Carey Rowan, Contra Costa County Law Library

Like many public libraries, California's county law libraries are frequently understaffed and underfunded, but their services are increasingly in demand, especially by members of the public. A recent survey estimates that self-represented litigants submit two-thirds of family law court filings and are self-represented in over 90% of eviction cases. Meanwhile, attorneys and businesses are also in need of resources provided by public law libraries. This panel session will cover innovative programs and partnerships at law libraries throughout the state: business partnerships at the San Diego Law Library; the virtual reference service used by Kern County Law Library to reach users in a large county; and the ways in which law libraries such as Contra Costa, San Bernardino, and others have been providing assistance to self-represented litigants and members of the public through free workshops, lectures, and consultations with legal professionals.

Hoarders: Library Edition

Jan Mellinger, Hillary Theyer, Torrance Public Library; Shawn E. Townsend, Upland Public Library; Betty Waznis, City of Chula Vista

Are you a pack rat at work? Piles of paper in the office? Document drafts taking 90% of available hard drive space? Afraid to toss that file in case you need it again? Join the club! A psychologist will explain where hoarding comes from, and your professional colleagues will discuss (and confess) physical hoarding, digital hoarding, and how to make your workspace efficient and streamlined. Tips and tricks galore for the real library working world!

Sponsored by the Public Libraries Interest Group

One Library, One Team

Charles Crouse, Palos Verdes Library District; Cheryl Gould, Fully Engaged Libraries; Sylvia Richardson, Palos Verdes Library District; Eve Wittenmyer, Palos Verdes Library District

Are people talking in meetings but not really saying anything? Are your colleagues agreeing with each other face-to-face and then voicing their true opinions in the lunchroom? Are departments working independently of one another? These are everyday challenges in many libraries. The good news is, it's fixable! Join us to hear how we spent a year transforming our management team into the library's true leadership team. You'll learn how you can use simple and fun team-building activities in any group or department within your library to improve efficiency, productivity, transparency, accountability, and morale!

Outreach Through the Side Door: Marketing Librarians and Library Services Through Faculty Development

Korey Brunetti, CSU East Bay; Andrew Carlos, CSU East Bay

In this session, two academic librarians share their experiences of leading faculty learning communities for teaching with technology. University professors are increasingly expected to teach large course sections. At the same time, pressures to infuse technology into existing courses—along with the steady march of online/hybrid offerings—have faculty scrambling to find classroom-friendly technologies with minimal learning curves. As both generalists with interdisciplinary perspectives on the academy, and as avid adopters of emerging technologies, librarians are well positioned to lead faculty explorations of educational technology. Our session will help users identify faculty support mechanisms (offices of faculty development, faculty tech labs) that can help the library connect with the teaching faculty. We will also address some successful strategies and pitfalls for leading faculty technology learning, explore how these interactions can help librarians form ongoing relationships with faculty, and demonstrate their value in new and perhaps unexpected ways.

Sponsored by the Academic Interest Group

Plan Once, Deliver 23 Times

Angie Mirafior, San José Public Library; Leslie Tanaka, San José Public Library

Find yourself reinventing the wheel when it comes to programming? Want to provide great programming while also saving time and money? Then consider centralizing! Join San José Public Library for a discussion about their Unit of Programming Services (UPS), a centralized programming department that delivers consistent, high-quality programs while saving many hours of staff time! Learn about the evolution of this innovative department that plans programs for 23 locations throughout San José. Attendees will discover ways to implement techniques, no matter what size the library system may be.

Seeds to Trees: Grow Your Own Future Bilingual Library Professionals and Advocates

Silvia Cisneros, Santa Ana Public Library; Cheryl Eberly, Santa Ana Public Library; Manuel Escamilla, Santa Ana Public Library; Patty Lopez, Santa Ana Public Library; Lynn Nguyen, Santa Ana Public Library

Santa Ana Public Library's Seeds to Trees program recruits bilingual Spanish-speaking high school students, college age youth, and MLIS students to the library in a combined volunteer and paid internship program. This proven method of mentoring and professional guidance provides students with exposure to the profession, hands-on experience, and mentored training in library-specific tasks and library advocacy. Our session includes "Seeds to Trees" participants at the high school, college, and MLIS candidate level. We will teach attendees how they can grow their own diverse future library professionals and advocates, and discuss what it means to make your library a responsive space that works for and with your community. This project was funded by an IMLS Laura Bush Librarians for the 21st Century grant, awarded to Santa Ana Public Library and the Orange County REFORMA Chapter, and titled, From Seeds to Trees: Growing the Bilingual Librarians of Tomorrow from high School Diploma to MLIS with the Santa Ana Public Library and Orange County REFORMA.

Successful STEM Programming at the Library

Karyn Dombrosky, Palm Beach County Library System; Cicely Douglas, Palm Beach County Library System; Wess Garcia, Rancho Cucamonga Library Services

This session will introduce and demonstrate the need for STEM programming in the library and offer the opportunity to hear what other libraries are doing to encourage educational growth within their communities. Attendees will learn about resources, get hands-on with simple activities that help foster an understanding of STEM concepts, and find out about successful programs that are sure to get children motivated and ready to learn. This program is for anyone who wants to inspire a love of STEM concepts in children ages five and up.

Sponsored by the Youth Services Interest Group

PROGRAMS & POSTERS

PROGRAM LEGEND



California State Library



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SESSION IV | 4:00PM - 5:00PM

MONDAY | NOVEMBER 4

Basic Elements of Public Speaking for Librarians 

Ernest Howard, Speakeasy Toastmasters; Win Shih, University of Southern California; Jie Tian, CSU Fullerton; Sally Tseng, Chinese American Librarians Association (CALA); Manuel M. Urrizola, UC Riverside

Do you get a little nervous expressing yourself in meetings or interviews? Are you terrified before giving a speech? Whether speaking before a group, talking to your colleagues, or informing a patron, you need to learn how to calm down, organize your thoughts, articulate, use props, entertain, advocate, persuade, and inspire. Learn the elements of skillful speaking and effective communication and have some fun learning!

Sponsored by the Chinese American Librarians Interest Group, Technical Services Interest Group, and Youth Services Interest Group

Can You Fit a Round Peg (Librarian) Into a Square Hole (Field Librarianship)?

Kelley Landano, Fresno County Public Library; Laurel Prysiazny, Fresno County Public Library

Struggling to figure out what meaningful work your librarians can do to warrant the high pay for the MLS degree? To solve this problem Fresno County Public Library has implemented the WoW (WithOut Walls) Mobile Branch Library. This is not your conventional library. This is staffed by Enterprising Librarians who are not tethered to a branch. These are librarians who are out in the field, delivering service directly to people where they live, eat, work, and recreate. As the term "enterprising" implies, these people undertake projects of importance or difficulty, projects that are often untried, and projects that require boldness, energy, and risk. This new model of service turns reference and information delivery on its ear. Come learn what the WoW is all about!

Children's Services in the Digital Age: Technology Competencies

Cen Campbell, LittleeLit.com; Elizabeth Gray, Yolo County Library; Genesis Hansen, Mission Viejo Public Library

Have children's services changed with the rising use of eBooks and mobile devices? If so, how? Scholastic's Kids & Family Reading Report tells us that 46% of children have read an eBook—up from 25% only two years ago. Most parents are interested in having their children read eBooks (72%). We will demonstrate how to use digital media in your story times, reader's advisory, and general children's services. Come away from this session with tips that fit your technology comfort zone! Learn more about how library websites, early literacy computers, and other technology can help you reach children and families. Take a look at what you are doing now and assess your ability to increase your use of digital media in the future. Outcomes include: a list of best apps for storytimes; basic competencies for eBooks; examples of using technology in storytime and Every Child Ready to Read programs; how to communicate the value of using digital media with children; and how children's services can best use their library's on-line resources and website.

Collection Connection: Engaging Readers Through Social Media 

Beth Lambert, Fei Tian Academy of the Arts California; Celeste Steward, Alameda County Library; Patrick Sweeney, San Mateo County Library; Andrea Taylor, Fullerton Public Library

Today's social media platforms present exciting opportunities for collection developers. Flex your online muscle with new and fresh ways to connect readers and collections through social media management. And learn how collection managers and selectors can incorporate tweets, posts, and visuals to build a more engaged and empowered readership.

Sponsored by the Collection Development Interest Group

Creating a Cacophany in the Classroom

Lisa Burgert, University of San Diego; Lorelei Sterling; University of San Diego

Experience first-hand four different active learning instructional methods. These techniques were taught at workshops and one-shots at the University of San Diego Copley Library during the 2012/2013 academic year. None were quiet, none were passive, not all were successful: (1) The Cephanoian method, a low-budget and low-tech method that quickly engages the audience by having them set the pace and directs instruction by having participants ask predetermined questions. (2) An online audience response system that gains feedback from a group that would rather text message than raise their hands. (3) A scavenger hunt based on a popular reality TV show that gets participants out of their seats. (4) Boogie through Boolean Operators. Attendees will learn how to create a completely new workshop based on a reality TV show, ways to avoid the mistakes we made, and how to integrate quick ideas to make existing programming more engaging.

Keeping It Real About Going Green

Jim Allen, County of Los Angeles Public Library; Eric Herman, County of Los Angeles Public Library; Floyd Willis, County of Los Angeles Public Library

Are you building (or dreaming of building) a new library and want to see innovative examples of sustainability? Or are you hoping to "greenify" your existing library? A panel of experienced facility managers from the County of Los Angeles Public Library have been there and done that and are ready to talk. Hear their success stories and lessons learned, and discover how similar initiatives can be launched at your library no matter the size or budget. Learn about one of the fastest growing building certification standards, LEED-EBOM (Existing Buildings: Operation and Maintenance). Come away with convincing talking points that you can use to help the decision makers in your library see the (green) light. And get straight talk about the other kind of "green"—the funds needed to implement these projects and the cost savings that can be achieved.

Quiet Riot: Activating Change from Every Organizational Level

Yemila Alvarez, San Francisco Public Library; Madeleine Kerr Idefonso, Los Angeles Public Library; Erwin Magbanua, San Diego Public Library; Allison Tran, Mission Viejo Public Library; Kelly Tyler, Los Angeles Public Library; Sarah Vantrease, Butte County Library

Do you see opportunities in your library system for improved service to the public? Are you looking for ways to enact meaningful change to connect your library's strategic plan with community needs? Are you hoping to increase positive communication, idea exchange, and morale for you and your colleagues? Organizational change has typically been associated with those in the top positions. But what about creating change from the ground up? Led by a panel of librarians who believe in taking the ego out of everything and putting the library and community in the forefront, this inspiring and interactive session will engage you in discussion about how to become a force for thoughtful and purposeful change.

Sharing Your Story with Elected Officials and Opinion Leaders

Deborah Doyle, California Library Association; Jan Sanders, Pasadena Public Library; Derek Wolfram, Santa Clara County Library District

Join leaders from CLA's Advocacy and Legislation Committee for an engaging discussion of strategies for effective advocacy at the local, state, and federal levels. Learn how to use a city or county's legislative platform to enable you as a staff person to engage in advocacy. Please come prepared to share your own effective strategies about advocacy, and questions for the presenters and your colleagues.

Volunteers Make Noise: Inside and Outside the Library

Darwin Eustaquio, San Mateo County Library; Celia Jackson, Oakland Public Library; Nina Lindsay, Oakland Public Library; Eva Mitnick, Los Angeles Public Library; Regina Powers, Anaheim Public Library

Volunteers can be so much more than book-shelvers! Four library systems share successful volunteer programs that align with key library goals in the areas of early literacy, school success, and teen leadership. Discover the joys, benefits—and frustrations—of working with volunteers. Learn how to recruit, train, supervise and retain your volunteers, as well as how to evaluate your program. And find out how volunteers of all ages can make some great noise inside and outside your library by reading aloud to kids, helping them with homework, and more!

PROGRAMS & POSTERS

PROGRAM LEGEND



SESSION I | 10:15AM - 11:30AM

21st Century Noir: A New Look at Three Classic Authors

Judith Freeman; Denise Hamilton; Tom Nolan; Julie Rivett

Mystery author Denise Hamilton interviews three writers who will give you new takes on old favorites. Dashiell Hammett's granddaughter, Julie Rivett, has the real story about Hammett in Hollywood and has unearthed screen treatments for two Thin Man movies. Tom Nolan is author of the critically acclaimed and Edgar Award-nominated *Ross Macdonald: A Biography*, an exhaustively researched portrait of a secretive and complex author. And Judith Freeman, novelist and USC writing professor, reveals in *The Long Embrace*: Raymond Chandler and the Woman He Loved, how Chandler's pre-writing life and unconventional marriage set the stage for a hugely influential career. Join us for a fascinating conversation, play the noir trivia game, and win at "Guess Which Writer Wrote This?"

Sponsored by the Collection Development Interest Group

Hear us Roar! Women Speak Out on Leadership, Ambition, and "Having It All"

Martha Camacho, Pasadena Public Library; Kathy Gould, Palos Verdes Library District; Mary George, Placer County Library; Genesis Hansen, Mission Viejo Public Library; Michelle Perera, Rancho Cucamonga Library Services; Rivkah Sass, Sacramento Public Library; Patty Wong, Yolo County Library

As Sheryl Sandberg points out in her new book, *Lean In*, women are now the majority of college graduates but men still hold the vast majority of leadership positions in both government and business. Even in librarianship, men are disproportionately represented in the top leadership positions. Our panel will engage attendees in a lively discussion of the values, circumstances, and cultural forces that lead women to pursue or reject top leadership roles. We'll talk about ambition, obstacles, sacrifices and rewards of leadership; cultural messages about women in leadership; fostering potential leaders in our organizations; how librarians can influence the culture at large; and "having it all" myth or reality? We'll brainstorm ways that we can value and respect the career choices women make while still working to break down barriers that might prevent them from moving up.

Instant Recess: Get Moving at the Library

Chikarlo Leak, UCLA; Melissa McCollum, County of Los Angeles Public Library; Jesus Mejia, Providence Little Company of Mary Hospital

Help bring recess back. Many California communities have identified health and wellness as a priority. Instant Recess, a fun and effective strategy developed by Dr. Toni Yancey, encourages regular 10 minute activity breaks that are easily incorporated into school, work, and community life. Libraries are ideal locations to get America moving, ten minutes at a time. Library staff will dance, take part in a California snowball fight, and work together as part of this high energy Instant Recess session led by a public health advocate, PE specialist, and public librarian. At the end of the session, attendees will have exercised for thirty minutes—more physical activity than most adults get in a week. Participants will also come away knowing the health challenges communities face; knowing the benefits of physical activity for all ages; and prepared to implement Instant Recess in a library setting, both with customers and during staff meetings.

Libraries Doing It For Themselves: The Rise of the Enki eBook Platform

Linda Crowe, Califa; Paula MacKinnon, Contra Costa County Library; Cathy Sanford, Contra Costa County Library; Heather Teysko, Califa

In 2012, Califa announced that it was building an eBook platform to be shared among California libraries. Now, through Califa's partnership with Contra Costa County Library, that platform is a reality. Attendees can come and learn about the platform built by libraries, for libraries; see a demo and download a book on their compatible ereaders; and see what it takes to build a product like this from start to finish.

Live from Los Angeles! An Inside Look, Confessions, and True Stories of @ilPLAPL

Mary Abler, Los Angeles Public Library; Jené Brown, Los Angeles Public Library; Joyce Cooper, Los Angeles Public Library; Karen Pickard-Four, Los Angeles Public Library; Jacquie Welsh, Los Angeles Public Library

Los Angeles Public Library is making some noise with its one-of-a-kind Innovation Leadership Program, a joint venture with the Library Foundation of Los Angeles. Join our lively discussion in talk show format and hear from two new librarian residents and their seasoned fellows. We will candidly share our challenges and accomplishments from the first of a two-year endeavor. Our studio audience will leave with a better understanding of what it takes to make a successful residency program work.

TUESDAY, NOVEMBER 5

Revving Up With CPLA... Vroom... Vroom...

April Butcher, Sacramento Public Library Foundation; Deborah Doyle, California Library Association; Robin Hoklotubbe, Santa Clarita Public Library; Alan Smith, Contra Costa County Library

The voice of the library community is more important than ever. CPLA (California Public Library Advocates, an association of trustees, commissioners, friends, and foundations) can help you strengthen your message to elected officials, partner with community organizations, and identify the philanthropic resources that are much needed. We will help you make some noise. As libraries face a shortage of resources, advocates can help by forming deliberate and cohesive advocacy communities that work together.

Sponsored by California Public Library Advocates: an association of Trustees, Commissioners, Friends and Foundations. Strengthening California libraries through advocacy and education.

Sound Off About Teen Lit: What's New and What's Next?

Randee J. Bybee, Upland Public Library; Courtney Saldana, Ontario City Library; Allison Tran, Mission Viejo Public Library

Stay on the cutting edge of teen lit trends, find out what you should read next, and join a lively discussion to predict contenders for the 2014 Michael L. Printz Award for Excellence in Young Adult Literature. This interactive session, presented by three youth services librarians who are passionate about teen literature, will breathe new life into your readers' advisory and empower you with the knowledge you need to fill any gaps in your YA fiction collection. Discover not-to-be-missed 2013 books, collaborate to create lists of titles that fit into new and upcoming trends in teen fiction, and gain the satisfaction of spreading the word about your favorite Printz Award possibilities. You'll come away with a mile-long to-read list, guaranteed!

Summer Lunch at the Library: Community Partnerships That Are Keeping Kids Healthy and Engaged When School is Out

Patrice Chamberlain, California Summer Meal Coalition; Natalie Cole, California Library Association; Lori Easterwood, Sacramento Public Library; Angelica Fortin, San Diego County Library; Kari Johnson, Fresno County Public Library; Nina Lindsay, Oakland Public Library; Eva Mitnick, Los Angeles Public Library;

Summer presents added challenges for children in low-income communities through limited access to summer learning programs, an inadequate number of safe community spaces, and an end to the free or reduced-price lunches provided during the school year. Participants will learn how California libraries are addressing these challenges by providing free, healthy meals for children in conjunction with their summer reading programs via USDA summer nutrition programs. We will discuss project results, best practices, and lessons learned in relation to program planning, working with partners and volunteers, program promotion, and program evaluation. Please join us to find out what we're doing and to explore how your library can become a summer meal site and help keep students engaged and healthy during the summer.

SESSION II | 11:45AM - 12:30PM

Adult Literacy at the Community College: Creating a Successful Partnership

Stephanie Allen, Sacramento Public Library; Judy Roller, American River College


Please join us to learn about establishing a partnership between your adult literacy program and your local community college. The session will include an action plan, templates of program materials and resources, and FAQ's on how to get started. Also included will be our strategies for success, along with a few "epic fails" to avoid. Participants will be given take-away materials to use in creating their own partnership and the session will include a question and answer period on how to adapt the model to fit your local program.

TUESDAY | NOVEMBER 5

PROGRAMS & POSTERS

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By Any Means Necessary: Who's Not in the Library?

Lana Adlawan, Oakland Public Library; Chris Brown, Contra Costa County Library; Nicole Pasini, San Mateo County Library; Morgan Pershing, Santa Clara City Library

What do foster youth, low-income teens, low-literacy adults, and veterans have in common? These groups are largely overlooked by the library field with information needs left, not just underserved, but unserved. Connect with four Fellows from the California Eureka! Leadership Institute who've each profoundly affected their community with library service to overlooked users. After a brief overview of their work, presenters will work with participants in small groups to help identify the overlooked in your local communities and strategize on how to effectively and successfully serve them. The mission of the Eureka! Leadership Institute is to develop future leaders for California libraries and for the library profession, to help California library staff become leaders in the communities they serve, and to promote the profession as a force for positive change in society.

Devices on Display: Let Your Devices Market Your Downloadable Content for You!

Mark Fink; Santa Clara County Library District; Megan Wong, Santa Clara County Library District

The Cupertino Tech Toolbar is a pilot project for the Santa Clara County Library District which addresses the challenge of marketing downloadable content using both volunteers and publically-displayed devices. In this session, we will show participants how to set up their own toolbar (including where to buy and how to install both furniture and mounts) and create a three-tiered level of service to address patron device questions.

Let's Play: Getting Messy at the Library

Pam Carlson, Long Beach Public Library; Brenda McIlroy, Santa Cruz Public Libraries

This session will enhance your library programming! Improve your storytimes with our suggestions for sensory play—including ideas you can use with children with special needs. Looking for a way of getting fathers more involved in your programs? Learn about an exciting new program from Santa Cruz Public Libraries called Let's Play and take part in a hands-on session that will explore active, constructive and noisy creations which will tempt the dads into your library. For dads who can't attend the in-house program we have Let's Play kits that provide the learning and fun in a pre-made, single tote package.

Sponsored by the Youth Services Interest Group

Inclusive Library Services: Training Your Staff to Serve all Families

Jean Herriges, San José Public Library; Angie Miraflor, San José Public Library

One in 88 children are identified with an autism spectrum disorder. Research suggests that children with autism benefit from oral reading, songs, and other pre-literacy efforts. San José Public Library and the Santa Clara County Office of Education's Inclusion Collaborative received an LSTA grant this year to create training videos for inclusive literacy services. Learn how to create a safe and welcoming environment specifically for children with disabilities and special needs. Attendees will come away with ideas and training materials they can implement quickly with little to no cost.

Make Some Noise with High-Tech Services for Kids and Teens

Katrina Bergen, Dixon Public Library; Cen Campbell, LittleeLit.com; Allison Tran, Mission Viejo Public Library

Libraries all around California are developing high-tech, multi-media, innovative services and collections for children and teens, and it's not just large, urban, well-funded libraries, either. Using examples from programs implemented in Silicon Valley, the Central Valley, and Southern California, this session will provide tips, tricks, and inspiration to make some noise with digital services for kids and teens. We'll show you how we developed digital storytelling programs, app collections, digital music collections, and multi-media programming for teens, and engage in a discussion that gets to the heart of why these services matter and how you can implement them at your library.

New MLIS! Same Old Job Hunt...

Diane Charlin, MLIS Graduate, SJSU, and Job Searcher; Autumn Luscinski, MLIS Student, UNT; Martha Arroyo Neves, San Francisco Public Library; Brad Rogers, LAC Group, Los Angeles; Hillary Theyer, Torrance Public Library; Darla Wegener, Long Beach Public Library; Patty Wong, Yolo County Library

Are you a recent graduate frustrated with the job hunt and trying to get your foot in the door? Our panel of recent MLIS graduates, employers, and agencies will discuss how to best use the experience you have, craft yourself to meet the needs of the public library market today, and use temp or agency work to your best advantage.

Sponsored by the UCLA Career Forum Series and the Public Libraries Interest Group

TUESDAY | NOVEMBER 5

Staff Day = Fun Day!

Louise Beebe, Palos Verdes Library District; Jennifer Chaffey, Palos Verdes Library District; Ketzie Diaz, Palos Verdes Library District

Want to have fun? Join us at the staff day presentation! We will be following the format of an actual staff day, starting with an icebreaker activity and moving on to interactive, team building exercises, and tons of fun. Attendees will be up and moving around, making noise, and learning how to implement a staff day in their own library.

Tinker, Maker, Solder, Pie: Makerspaces and Libraries

Lia Friedman, UC San Diego; Gayatri Singh, UC San Diego

Makerspaces are being created in libraries both public and academic and range from fancy and technology-heavy (3D printers! Arduino workshops!) to simple and crafty (Build your own lego robot! Learn how to knit!). Library lovers and Makers have teamed up with BoingBoing to create LibraryLab, a place to show the world how incredible libraries are. One of LibraryLab's projects is MAYker Mondays, calling on libraries to create maker events every Monday in May. We'll showcase the UC San Diego Library's projects, share information on what other libraries are doing, and most importantly share hands-on how-to's for Maker events from fancy to simple that anyone can do in their library. We will also share strategies on how to start Makerspaces in your libraries and identify potential partners.

POSTERS | 12:30PM - 1:30PM

"And The Medal Goes To...": How a Great Book Becomes a California Young Reader Medal Winner!

Kelly Hulbert, County of Los Angeles Public Library; Carolyn Reed, County of Los Angeles Public Library; Julie Todd, El Segundo Public Library

What is the journey that a book takes from being recommended, to being formally nominated, to being voted for by young readers, and finally to being announced as a California Young Reader Medal winner? Our poster will illustrate that journey, focusing on the participation of the young readers who voted on the 2013 medal winners.

Creating a Technology Center at Zero Capital Cost to your Jurisdiction ☒

Jessica Hudson, Nevada County Library

This poster presentation will include information on finding local and state funding for your Technology Center, the process we have used to bring our project to fruition, and a piece on Hoshin lean project management. Come along to find out more!

Crowdsourcing the California Digital Newspaper Collection ☒

Brian Geiger, UC Riverside

The California Digital Newspaper Collection (CDNC) went online in 2007 and implemented user text correction (UTC) in 2011. In less than two years, over 1,000 users have registered and corrected over 90,000 lines of text. This poster presentation will demonstrate how the UTC works and, based on a survey conducted in the spring of 2013, will assess who uses the UTC, how and why. We will look at the motivations, demographics and experiences of text correctors, examine the quality of their corrections, ask what kinds of data they prefer to correct, and look ahead at what types of additional tools we might develop to allow them to move beyond text correction to edit the data in new and innovative ways. The CDNC is freely available at <http://cdnc.ucr.edu>.

Dear Doctor: Help Me! Signed, Anxious Teen

Lesley Farmer, CSU Long Beach

Teens need and want information about health issues. Increasingly, they access digital resources because of the Internet's availability, affordability, and anonymity. Libraries provide a neutral safe venue for such information, and they can guide teens in locating, evaluating, and using those resources. Not only does gender impact the content, but it also impacts how teens seek that information. Technology use also has gendered factors that impact information seeking behaviors. Technology also impacts health information needs of at-risk teen populations. This poster presentation shares gender issues of teen technology use to find health information, and offers recommendations to ensure optimal library services to address health information needs of ALL teens.

Día Celebration of Community and Children's Diversity

Yolanda Alaniz, County of Los Angeles Public Library; Martin Delgado, County of Los Angeles Public Library

The Huntington Park Library with the support of REFORMA, LA Chapter, has conducted Día events for several years. It is a fun, interactive, and thinking-out-of-the-box experience for everyone, and a cultural practice that involves the community, artists and storytellers. We will share our experiences of our very successful program and will display program materials, a video, and photographs of the library's 2013 Día program.

PROGRAMS & POSTERS

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eBooks for Everyone! (Let Me Tell You a Story)

Ashley Kagan, Palos Verdes Library District; Deb Ripley, Palos Verdes Library District

How many times have you broken into a cold sweat from seeing a patron approach, device in hand? Is it a Kindle? An iPhone? A Nexus what?! You know it's YOUR job to answer everything. Fear not. Librarians love stories, and this poster session will tell a quick, entertaining story of PVLDD's successful eBook training program. Armed with flyer examples and sample class giveaways, conference participants will go back to their libraries excited to act!

Fizz, Boom, Read!

Pam Carlson, Long Beach Public Library

Science is the theme for the 2014 Collaborative Summer Library Program. Explore incentives and artwork and take home a test tube of ideas for what looks to be an explosive summer of reading.

Get Involved: Powered by Your Library

Carla Lehn, California State Library

Successful engagement of skilled volunteers is the goal of the Get Involved: Powered by Your Library Initiative. We are thinking about volunteers in a new and different way! Instead of using volunteers only in traditional library volunteer positions, we will expand attendees' thinking about how they could use a volunteer who wants to share their skills as a graphic designer, event planner, computer expert, trainer and more!

Got GOTS? Using Guide on the Side at your Library

Mira Geffner, San José State University; Colette Hayes, San José State University

Let's make some noise about GOTS, the University of Arizona's new open source Guide on the Side software! Come learn how two MLIS students used Guide on the Side to create an interactive tutorial for one of their public library's licensed health databases. GOTS makes quick work of producing a database guide and has been well-received in the academic library community. This poster will encourage other types of libraries to experiment with a tool that has the potential to encourage and strengthen both procedural- and conceptual-based information literacy skills for many types of library users and learners.

Intro to the UCLA Diversity Council

Mahnaz Ghaznavi, Loyola Marymount University; Florante Ibanez, Loyola Law School; Cynthia Mari Orozco, Loyola Marymount University; Albert Tovar, Retired Library Director

The UCLA Diversity Council's goals are to recruit new applicants to library and information science graduate programs (at UCLA and beyond); increase the visibility of the IS program at UCLA through conferences and in working with professional library organizations; help to ensure a more diverse student and faculty population; help to identify and encourage the Department's participation in supporting scholarship opportunities, such as the ALA Spectrum Initiative; increase the number of Ph.D. applicants to IS programs; and promote mentoring activities for new and continuing students. Come along to find out more about us.

Library Spots in Public Parks

Hillary Theyer, Torrance Public Library

Learn how Torrance built upon the Little Free Library trend, placing Library Spots in public parks. Partnerships with a local artist, community volunteers, and beautiful park spaces bring materials to a targeted population that cannot reach or effectively use a traditional branch library.

LibraryThing Creates a Soft Catalog and Plenty of Buzz in a Special Collection

Rachel Schmidt, Scandinavian American Cultural and Historic Foundation

LibraryThing is a versatile tool, perfect for creating a soft catalog for small non-circulating book collections at institutions large and small. The Scandinavian American Cultural and Historical Foundation took a backload of at least a dozen boxes of donated books and organized them via LibraryThing. In the process, they created a tool for expanding their influence and attracting others interested in learning and discussing Scandinavian and Scandinavian-American culture.

Lights, Camera, Action! Producing Videos for Your Library

Madeline Pena, Los Angeles Public Library

In June 2012, staff at the Los Angeles Public Library produced two high-quality YouTube videos to promote resources and services, by simply using a digital camera, free editing software, and some creativity and enthusiasm. Learn about the process, watch the final results, and get inspiration to get started on your own video project.

My Month with Bing

Carla Arbagey, University of California, Riverside

See what happens when a librarian switches from Google to Bing for an entire month. Is one better than the other? What is a decision engine? How are the search results different? Find the answers to these and other questions, plus a chance to take the Bing It On! Challenge in this poster session.

Oakland Reads 2020 and The National Campaign for Grade-Level Reading

Nina Lindsay, Oakland Public Library; Alicia Maldonado, Campaign for Grade Level Reading

Does your library have a role in the National Campaign for Grade Level Reading? It can, and it should. Campaign chapters throughout the state are not yet connected with their public libraries. Learn about the Oakland Reads 2020 campaign kick-off, and how the Oakland Public Library has made traditional library services such as storytime and summer reading an integrated part of the campaign goals through active participation in the Oakland Literacy Coalition.

The Cutting Edge: Libraries & Cricut

Angela Chadbourne, Los Angeles Public Library

Learn about creating a low-cost adult collection and Makerspace using a Cricut machine and cartridges. Use the Cricut to encourage and connect with new library users through promotion and programming.

SESSION III | 1:45PM - 2:45PM

Becoming Your Own Best Advocate: Developing Powerful Influence

Ken Haycock, University of Southern California

Why are some libraries more successful in securing funding than others? Why are some leaders more successful in working with City Hall and the legislature than others? How do decision-makers and funders make their choices? For the past five years we have interviewed politicians and their senior staff and examined budget successes and problems, and we have identified six principles for becoming a powerful advocate with influence. Learn them. Use them. Make a difference.

Extreme Health Makeover: Transforming Your Customers and Staff into Community Health Champions

Melissa McCollum, County of Los Angeles Public Library; Biz Tanner, County of Los Angeles Public Library; Marta Wiggins, County of Los Angeles Public Library; Judy Wiegel, County of Los Angeles Public Library

Four enthusiastic librarians will share how they made their libraries and communities healthier through programs, partnerships, and their own personal passion for better living. Come learn how to transform your library customers of all ages, plus your staff, into community health advocates and leaders. Our panelists are ready to share their successes and their lessons learned. You'll hear about a Teen Advisory Board that created its own cookbooks and videos, and a library that created a community spirit of relaxation and rejuvenation through spa days. Attendees will be encouraged to think about how these programs could be customized and implemented at their own libraries, and will be asked for feedback on how the programs could be made even more effective.

Library of the Year: Going From Good to Great in Just Five Years

José Aponte, San Diego County Library; Chelsie Harris, San Diego County Library; Susan Moore, San Diego County Library

San Diego County Library was named the 2012 Library of the Year, having drastically increased services over the past five years despite a smaller budget. Find out how as top library leaders share the strategies that brought SDCL to the forefront and their tips for communicating their success.

Library Reality TV: Scenes From Your Local Public Library. Using Improv Techniques to Transform Your Approach to Customer Service

Henry Bankhead, Los Gatos Public Library; Jenn Laredo, Los Gatos Public Library; Heidi Long, Los Gatos Public Library; Melissa Maglio, Los Gatos Public Library

Attendees will learn how improvisational techniques can help you provide excellent customer service in the library setting. Special attention will be paid to how body language affects communication and perceptions about communication. All participants will gain confidence through role-playing common public library scenarios using improv techniques. Attendees will learn how to share these techniques with coworkers and how these techniques can dramatically improve library services.

TUESDAY | NOVEMBER 23

PROGRAMS & POSTERS

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Non-Traditional Collaborations: Reaching Beyond the Mental Health Clinic Through Libraries ☒ 🌐

Debbie Anderson, County of Los Angeles Public Library; Muriel Cormier, County of Los Angeles Department of Mental Health

Reaching a broader audience of young children and families in a community can be more effectively accomplished through non-traditional collaborations. The County of Los Angeles Public Library and the Department of Mental Health launched the Mental Health Parenting Program to strengthen parenting skills and relationships with children ages 0-18. The goal of this novel partnership is to offer opportunities for parents to strengthen both their parenting skills and their relationships with their children through three distinctive programs: Triple P (Positive Parenting Program) Family Place, and Parent Cafés. This robust array of family-centric programs are designed to cultivate a love of learning, unite families, and provide early detection and management of child behavior problems.

Partners in School Readiness: Early Childhood Applications for Library Service

Clio Hathaway, Hayward Public Library; Nina Lindsay, Oakland Public Library; Eva Volin, Alameda County Library

Explore strength-based family service and early literacy program ideas with three neighboring library systems who participated in a collaborative grant process with First 5 Alameda County, and transformed their findings into sustainable service. Alameda Free Library, Hayward Public Library, and Oakland Public Library developed targeted storytimes, playgroups, facilities, and manipulatives to encourage early literacy development and parent knowledge and engagement.

Resources Slipping Away: Those Experts You Need Will Go Somewhere Else! ☒

Cathy Crosthwaite, Sacramento Public Library; Robin Hoklotubbe, Santa Clarita Public Library; Carla Lehn, California State Library; Hillary Theyer, Torrance Public Library; Shawn Thrasher, Ontario City Library

Volunteers can be an essential library resource, and evidence shows we are letting them slip away. Learn to take advantage of their skills, desires, and expertise, and use them for your library. A panel from the California State Library's Get Involved Initiative will speak about leveraging experience in volunteers, allowing and empowering volunteers to speak for your organization, overcoming fears of volunteers "going rogue" on your mission, building a strong volunteer program around adversity, and working with management to ensure success. We will then share experience in small groups, offering personal advice from the front lines.

Sponsored by the Volunteer Interest Group

Selling New Tools... To Our Patrons and Our Colleagues

Scott Breivold, CSU Los Angeles; Holly Yu, CSU Los Angeles

This session will begin with a demonstration of the useful functions of the discovery tool and will explain how we conducted focus groups with students in an effort to win over both our users and colleagues. We will share our new library home page design and how we introduced a Google-like new discovery search tool option. Attendees will then participate in a facilitated brainstorming session to explore ways in which other librarians have tested, promoted, and marketed new technologies or resources at their library.

SESSION IV | 3:00PM - 4:00PM

Early Learning @ the Library ☒

Sally Ainsworth, Tehama County Library; Carolyn Brooks, El Dorado County Library; Kathy Walker Guerrero, First 5 El Dorado

Would you like to have more time *and* have rich children's programs? You can have both when you use the California State Library's Early Learning @ the Library Pinterest site! The site brings together the best in developmentally appropriate programming activities for children and their families, and anyone with online access can use it! It has everything you need to create the fabulous programs you dream about but never have time to do. Come find out how to best utilize this incredible resource, participate in fun activities, and chat with the groups that made this possible: El Dorado County Library, First 5 El Dorado, Tehama County Library, and the California State Library. Oh, by the way, did we mention that we have over one hundred storytime kits for you? They are ready to be downloaded and put together for immediate use by your staff, caregivers, parents, and preschool teachers!

TUESDAY | NOVEMBER 5

FindIt! Vs. Dewey: The Rumble in San Mateo County!

Nicole Pasini, San Mateo County Library; Sandy Wee, San Mateo County Library

Dreaming of dumping Dewey? Wondering why anyone would ever want to? Either way, join San Mateo County Library (SMCL) staff as they share their experiences with the implementation of their word-based classification system for nonfiction, FindIt! From developing a completely new classification system and converting collections, to training staff and patrons about the system and its benefits, we'll cover everything you want to know about implementing a new word-based classification system. SMCL received a Pacific Library Partnership Innovation and Technology Opportunity Grant for this project.

From Aha to Wow: Reimagining Core Programs

Tracie Carignan, Riverside County Library System; Lisa Gonzalez, Santa Barbara Public Library; Beverly Schwartzberg, Santa Barbara Public Library; Darla Wegener, Long Beach Public Library

This session will reimagine existing library programs and ask new questions about what your library needs and how to build new library communities in your service area. Our lively, think-aloud workshop lets you frame the questions about public programming and outreach, and share the results with your peers. Discover film, publicity, evaluation tools, web links, and results from Santa Barbara Public Library's Siblings Project. Supported by an IMLS National Leadership planning grant, this project promoted early literacy skills, re-thought the summer reading program, and turned small ideas and community connections into new assets and audiences. And hear about the innovative Book to Action programs at Long Beach Public Library and Glen Avon Regional Library, and get ready to act! Book-to-Action builds on the traditional book club concept by enabling participants to engage in a community service project related to the book's topic.

From Youth Services to Library Management

Ryan Baker, Irwindale Public Library; Heather Cousin, Moorpark City Library; Shawn Thrasher, Ontario City Library

Looking to make the jump from youth services to library management? How do you negotiate a career path towards library management and leadership when the skill you are most recognized for is storytelling? How do you convince others you are capable of making the heavy administrative decisions when your regular routine involves playing video games with teens? Ever feel that a Youth Services résumé is a roadblock to moving higher up the leadership ladder? Join three library administrators who made that youth services-to-management jump as they discuss overcoming stereotypes of youth services librarians, building crucial management skills, and learning to take on the whole library.

Sponsored by the Management Interest Group

Graphic Novel Mythbusting

Francisca Goldsmith

When you hear "graphic novel," do you think "teen" or "remedial reading"? Come bust those pigeonholing myths and learn what reading sequential art really takes, and how it provides experiences for readers seeking fact and/or aesthetic delight.

The Long and Winding Road to Organizational Health

Diane Cowen, Santa Cruz Public Libraries; Cheryl Gould, Fully Engaged Libraries; Teresa Landers, Santa Cruz Public Libraries

Learn how one medium-sized library is experiencing an internal transformation from a top-down culture to a learning organization, all during a period of extreme hardship and community strife over the future of the library. The good, the bad, and the ugly will be revealed along with lessons learned and advice on how to successfully change your library's culture and achieve organizational health.

Popup Makerspace: Creating a Makerspace Without the Space!

Ann Awakuni, Mountain View Public Library; Paul Sims, Mountain View Public Library

Don't have the space or staff for a full-fledged Makerspace in your library? Find out how Mountain View Public Library created popup Makerspaces that incorporated many of the tools, resources, and supplies of traditional Makerspaces without a dedicated area. Learn some quick, simple, hands-on projects that foster creativity, sharing, and participatory learning. And discover strategies for attracting volunteers, generating community interest, and building partnerships that made their Maker events successful. Also join the presenters in the Exhibit Hall to make a simple hands-on project!

Salsa, Paso Doble, or Cumbia? Teaching Library Research Skills to Latino Students in Spanish

Eileen K. Bosch, CSU Long Beach

This session describes a librarian-faculty collaboration that created an information literacy workshop in Spanish to facilitate and enrich the learning experience of Latino students at a Hispanic-serving institution. We will address instruction in the target language; the library as a nurturing learning environment; ongoing assessment; and task- and content-specific tailored activities. Participants will learn about pedagogical goals including library search worksheets and hands-on activities, and the results of students' evaluation (formal and informal surveys) that helped determine whether library instruction in a language other than English improved student learning outcomes. At the end of the session, librarians will learn how to plan and implement similar instruction programs for their institutions even if they do not speak the students' native languages.

PROGRAMS & POSTERS

PROGRAM LEGEND

 California State Library

 Crowdsourced

Why Should Libraries Reach Out to U.S. Veterans? Serving Those Who Served Us

Karen Bosch Cobb, Infopeople; John "Buzz" Kraft, California Department of Veterans Affairs; Kristin Mulvihill, Consultant

We will start by telling two or three stories of veterans whose lives have been changed by libraries. Kristen Mulvihill, veteran and librarian, will introduce John "Buzz" Kraft of the Department of Veterans Affairs who will explain why CalVet believes California libraries can help veterans. Then a panel of library staff and volunteer veterans will discuss their triumphs, and "oops, that is not working" efforts. Attendees will leave with a virtual "duffel bag" with resources to create a Veterans Resource Center at their library. There will be time for comments, and questions and answers.

TUESDAY | NOVEMBER 5

PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Jeanette Contreras, Library Director

FROM: Yesenia Baltierra, Business Manager

SUBJECT: **Amendment to Resolution 14-01: An Amended Resolution of the Board of Trustees of the Placentia Library of Orange County to Adopt Fiscal Year 2013-2015 Budget for the Placentia Library District of Orange County**

DATE: September 11, 2013

BACKGROUND

On the Library Board of Trustees Meeting held on May 20, 2013, the Library Board of Trustees approved the Budget for Fiscal Year 2013-2015. The County of Orange Auditor Controller's Office requires that we provide budget numbers based on their fund balances reports. The Amended Resolution 14-01 reflects the budget number for Fiscal Year 2013-2014 as requested by The County of Orange Auditor Controller's Office. Changes to Fiscal Year 2014-2015 will be presented to the Board once County provides reports.

Attachment A is Resolution 14-01.

Attachment B is the County of Orange Schedule for Reserve Requirements

RECOMMENDATION

1. Motion to read Amended Resolution 14-01 by title only: An Amended Resolution of the Board of Trustees of the Placentia Library District of Orange County to Adopt Fiscal Year 2013-2015 Budget for the Placentia Library District of Orange County
2. Motion to adopt Amended Resolution 14-01 by roll call vote.

RESOLUTION 14-01

AN AMENDED RESOLUTION OF THE BOARD OF TRUSTEES OF THE
PLACENTIA LIBRARY DISTRICT OF ORANGE COUNTY TO ADOPT
FISCAL YEAR 2013-2015 BUDGET FOR
THE PLACENTIA LIBRARY DISTRICT OF ORANGE COUNTY

WHEREAS, the budget for the Placentia Library District of Orange County for Fiscal Year 2013-2015 was approved at the Regular Meeting of the Board of Trustees on May 20, 2013, and Resolution 14-01 has been amended to reflect The County of Orange Controller's budget report for the first half of the biannual Budget Fiscal Year 2013-2014; and

WHEREAS, all sources of income have been identified to support said budgets.

THEREFORE BE IT RESOLVED, that the Placentia Library District of Orange County Board of Trustees adopts the budget for Fiscal Year 2013-2015, and implements such on July 1, 2013 as \$3,605,619 for Fiscal Year 2013-2014 and \$2,174,102 for Fiscal Year 2014-2015.

AYES:

NOES:

ABSENT:

ABSTAIN:

State of California)

)ss.

County of Orange)

I, Gayle Carline, Secretary of the Board of Trustees of the Placentia Library District of Orange County hereby certify that the above and foregoing Resolution was duly and regularly adopted by the Board of Trustees at a Regular Meeting hereof held on the eleventh day of September 2013.

IN WITNESS THEREOF, I have hereunto set my hand and seal this eleventh day of September 2013.

Gayle Carline, Secretary
Board of Trustees of the Placentia Library District

COUNTY OF ORANGE
 Placentia Library DISTRICT
 FOR FISCAL YEAR 2013-2014
 SCHEDULE FOR RESERVE REQUIREMENTS

Description/BSA/Dept BSA	1 2012-2013 Current Reserves	2 Cancellation Of Reserves	3 Increase Or New Reserves	4 Reserve For 2013-2014
General Reserves (BSA 9850)	538,807			538,807
Imprest Cash (BSA 9829)				
Other Reserves (Provide Detail):				
TOTAL	538,807			538,807

INSTRUCTIONS

1. Record current reserves in Column 1. Post amounts from Column 1 to Schedule for Fund Balance Available, Lines 5A and/or 5B.
2. Record any decreases in reserves for the new budget year to Column 2.
Post all Cancellation of Reserves in Column 2 to Budget Form, Cancellations of Reserves
3. Record any increases or new reserves for the new budget year to Column 3.
Post all Increases/New Reserves in Column 3 to Budget Form, Increases/New Reserves
4. Reserves for 2013-2014 (Column 4) = Current reserves (Column 1) - Cancellation of Reserves (Column 2) + Increase or New Reserves (Column 3).

Prepared by: (District) Yesenia Baltierra Telephone: (714) 528-1925



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PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES

TO: Library Board of Trustees

FROM: Jeanette Contreras, Library Director

SUBJECT: **Placentia Library District Policy 2325 – Job Description – Library Aide**

DATE: September 11, 2013

BACKGROUND

At the April 22, 2013 Library Board of Trustees meeting, all the current job descriptions were approved as recommended by a contracted Human Resources Consultant.

Library staff recommends an inclusion to the current Placentia Library District Policy 2325 – Job Description – Library Aide to permit this classification to perform passport duties.

Attachment A is a copy of the proposed amendment.

RECOMMENDATION

Authorize an amendment to Placentia Library District Policy 2325 – Job Description – Library Aide, as presented.



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Placentia Library District- Policy #2325

Library Aide

DEFINITION:

Under the general direction of the Circulation Supervisor, shelves library materials, monitors all public service areas including library furnishings, equipment and patron activities, and performs basic-level clerical library work in the Adult, Circulation, Children's, or Administration Departments.

SUPERVISION RECEIVED AND EXERCISED:

Receives general direction from the Circulation Supervisor and direct supervision from a Library Clerk. Does not supervise other employees.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS:

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Staffs the Circulation Desk by checking-in library materials and sorting materials for shelving and interlibrary loan.
- Staffs the Circulation Desk by checking-out library materials, collecting fines and fees, registering new patrons, renewing patron registrations and assisting patrons with the use of the photocopy machines.
- Works in the Public Service areas monitoring library furnishings, equipment and patron activities with the authority to enforce written Library policies and report problems to the librarian or manager-in-charge.
- Prepares library materials for public use.
- Maintains cordial relations with all persons entitled to the services of the District, and refers all public inquiries to the appropriate public service desk.
- Seeks to carry into effect the expressed policies of the Board of Trustees.
- Checks-in library materials on the computer.
- Empties the book drop.
- Sorts and shelves incoming books, audio-visual materials, and periodicals.
- Repairs damaged library materials.
- Inspects the public restrooms on a regular basis and reports problems to the Circulation Supervisor or the Person-in-Charge.
- Keeps library materials in order on the shelves when shelving and also when assigned an area to inspect.

- Searches for library materials on the shelves as assigned by Library staff.
- Retrieves newspapers and magazines from storage areas.
- Assists public with unloading gift books and magazines from their cars.
- Sets up and breaks down tables and chairs in the Meeting Room.
- Recommends policies for public services to the Circulation Supervisor.
- Serves as a United States Passport Application Acceptance Agent.
- Performs other duties as assigned.

QUALIFICATIONS:

Knowledge of:

- The Dewey and other shelving classifications

Ability to:

- File accurately according to library filing rules.
- Meet the public with tact and courtesy.
- Follow oral and written instructions.
- Establish and maintain effective working relationships with co-workers, the public and community organizations.
- Follow Library policies and procedures.
- Organize and manage work flow for self.
- Perform book repair tasks and physical processing of new library materials.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from high school or the equivalent.

Licenses and Certifications:

Possession of a valid California driver's license.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the typical tasks of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the typical tasks.

Must possess mobility to work in a standard office setting. Must possess hearing and speech to communicate in person and over the telephone. The incumbent is required to sit; use hands to finger, handle, or feel objects; twist and reach with hands and arms. The incumbent is required to stand; walk; and stoop, kneel, or crouch. The incumbent must be able to push or pull book carts weighing up to 25 pounds and have the strength to pick up and carry supplies weighing up to 20 pounds. The incumbent must be able to see to perform data entry. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception and the ability to adjust focus.

ENVIRONMENTAL ELEMENTS:

The work environment characteristics described here are representative of those an incumbent encounters while performing the typical tasks of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the typical tasks.

Most work is performed in an office setting.

WORKING CONDITIONS:

N/A.

FLSA STATUS:

This is a non-exempt clerical classification.

