City of Santa Fe

Agenda

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SANTA FE PUBLIC LIBRARY BOARD

SPECIAL MEETING

Main Library
145 Washington Avenue
Community Room

Thursday, May 17, 2018
1:00 p.m.

I. ROLL CALL

II. NEW BUSINESS
RFP Presentations

III. DATE OF NEXT BOARD MEETING

IV. ADJOURNMENT

Persons with disabilities in need of accommodations, contact the City Clerk's office at 955-6520, five (5) working days prior to meeting date.

SUMMARY OF ACTION
SANTA FE PUBLIC LIBRARY BOARD
MAIN LIBRARY, COMMUNITY ROOM
145 WASHINGTON AVENUE
THURSDAY, MAY 17, 2018, 1:00 PM

ITEM	ACTION	PAGE
CALL TO ORDER		1
ROLL CALL	QUORUM	1
NEW BUSINESS		
PRESENTATION #1 GODFREY'S AND ASSOCIATES, INC.	INFORMATION/DISCUSSION	1-3
PRESENTATION #2 THE IVY GROUP, LTD.	INFORMATION/DISCUSSION	3-5
PRESENTATION #3 LIBRARY STRATEGIES	INFORMATION/DISCUSSION	5-7
DATE OF NEXT BOARD MEETING	APPROVED MAY 29, 2018	7
ADJOURNMENT	ADJOURNED	8

SANTA FE PUBLIC LIBRARY ADVISORY BOARD
MAIN LIBRARY, COMMUNITY ROOM
145 WASHINGTON AVENUE
THURSDAY, MAY 17, 2018, 1:00 PM

1. CALL TO ORDER

The meeting of the Santa Fe Public Library Board was called to order by David Wagner, President at 1:00 PM, on Thursday, May 17, 2018, at the Main Library, in the Community Room, 145 Washington Avenue, Santa Fe, New Mexico.

2. ROLL CALL

BOARD MEMBERS PRESENT
David Wagner, President
Susan Gilbert
Rebecca Phillips
Latifah Phillips
Marie Schow

BOARD MEMBERS ABSENT
Rebecca Allahyari, Excused
Carlo Brady, Excused

OTHERS PRESENT
Pat Hodapp, Director of Libraries
Marie Finley, Special Projects Administrator, Libraries
Gail Vigil, Contracts Administrator, Libraries
Elizabeth Martin, Stenographer

3. NEW BUSINESS

RFP PRESENTATIONS

21st Century Library Presentation
Library Study and Long Range Planning RFP for the City Public Libraries.

Presentation Number 1

Godfrey's and Associates, Inc.
Dick Waters, Brad Waters present
Martin Gomez, Amy Paul, telephonically

The Godfrey's and Associates, Inc. presentation is attached herewith to these minutes as Exhibit "1".

Questions/Comments from Board Members:

Ms. Gilbert said 5 to 6 months is fast to her. Do you see these going longer and if so, will there be an impact to fees.

Mr. Waters said unless there are additional services added the fee is valid no matter what for up to a year.

Ms. R. Phillips asked do you factor in non cardholders as potential users.

Mr. Waters said yes

Ms. R. Phillips asked how would you capture folks in the County who are users and also members of another community library.

Mr. Waters said there will be a whole registry of users.

Ms. Hodapp said we serve the County as well. 18% of our cardholders are in the County. The County gives us $25,000 each year.

President Wagner said working with local governments is an issue for us. We need them to understand the value of the library.

Ms. Paul said she has a lot of experience in that. She will work with them to help them by talking with people and with the needs assessment to show the value and try to tell your story of why the library is vital to the community. We can also help with bench marking.

President Wagner said he is hoping to have a plan to implement for the City and County to have a reliable and adequate source of funding.

Mr. Waters said that will be in our plan.

Ms. Paul said we can give you the tools to do it.

Ms. L. Phillips asked how do you ensure you are culturally diverse in your recommendations.

Mr. Waters said we make every effort to do that and we have bilingual sessions for the public.

Ms. Gilbert asked will you also be looking at money from our Friends operation

and how they support us.

Mr. Waters said yes. We will be looking at grant opportunities too.

Ms. Schow asked we will receive the data reports and survey results.

Mr. Waters said yes you will receive them periodically as we go forward.

Ms. R. Phillips asked what will have the greatest impact on staff time.

Mr. Waters said identifying focus group participants and stakeholders. The initial contacts. One person will be designated as a go to person for them. It will also take staff time to send us all the background data we will need.

Mr. Waters said we will staff the focus groups.

President Wagner asked how many visits out here will you make.

Mr. Waters said we will be out here once a month.

Ms. Schow asked who will be our point person.

Mr. Waters said he will be the project manager and your contact.

Ms. Schow asked how many other projects would you be working on while you work on ours.

Mr. Waters said right now 2. We typically manage 4 to 5 projects at the same time.

President Wagner asked are library districts hard to pull off

Mr. Waters said the legislation is hard to pull off. Setting up another government entity is the downside.

Presentation Number 2

The Ivy Group, Ltd.
Pam Fitzgerald

The Ivy Group, Ltd. presentation is attached herewith to these minutes as Exhibit "2"

Questions/comments from the Board:

Ms. L. Phillips asked what about the facilities assessment.

Ms. Fitzgerald said we first look at standards for the State and the City. Then we do site visits to interview staff, look at their workspace, assess meeting spaces, lighting, signage, walls etc. She will send the Board what we use to do the assessments. Then we compare to what the community says they need. All 3 of your libraries could use an internal space study. There is underutilized space and there are merchandising opportunities. We also look at ADA compliance.

President Wagner said one issue facing us is adequate funding. Can you help us with that including grants, City government funding and County funding.

Ms. Fitzgerald said libraries are in a place where there is always a need for funding, but there is a trend away from it. We would look at what you are doing with private philanthropy and we would help you form a strategic planning committee who can help. We will institute bench marking. We can also produce materials for advocacy and partnerships. There has to be more thought given to developing a case for giving and cultivating high prospects for annual giving.

President Wagner said he would also like to strongly show the City and County how important libraries are.

Ms. Fitzgerald said we will need Board members who are willing to talk with Councilors.

Ms. Hodapp said the State Library does an annual report where we can see how we fare against other New Mexico libraries.

Ms. Gilbert said regarding the financial piece, how are you going to build in the cost structures.

Ms. Fitzgerald said physical resilience. How are we going to crate a structure to sustain and grow operations.

Ms. R. Phillips asked what is the right formula for a consistent level of funding that allows us to sustain a certain level of service and program. Would we have that at the end of our work with you.

Ms. Fitzgerald said there is a lot of coaching and mentoring that goes with this. We will have the formula at the end. We will be talking all along about if the public piece is important to you, the first thing is to engage key people into planning and publicize the process and invite people to participate. There are important things we can do to lay the groundwork for funding.

Ms. Hodapp asked when approaching nonusers and Spanish speakers, how do you get to nonusers with the survey.

Ms. Fitzgerald said we will call and or supply surveys in any language they are comfortable with.

Ms. Fitzgerald said we will use ways the Cities use to give people immunizations and we will do surveys in the libraries and churches. We would put strategies in for this. We would also recommend building a collection for other languages.

Ms. Gilbert asked how can telephone interviews be successful.

Ms. Fitzgerald said we have to make 20 calls to get one. We try to use cell numbers. We use very skilled interviewers.

Ms. L. Phillips said typically we get participation from older community members, but that group votes.

Presentation Number 3

Library Strategies
Stu Wilson

The Library Strategies presentation is attached herewith to these minutes as Exhibit "3".

Questions/comments from the Board.

Ms. R. Phillips asked do you see the Board helping to design the survey

Mr. Wilson said we have a starting base, but it can always be modified. We would ask Ms. Hodapp to review the draft survey.

Ms. R. Phillips asked who conducts the interviews.

Mr Wilson said we do.

President Wagner asked how do you do that.

Mr. Wilson said sometimes we don't get people, but we start with emails then call. We are dogged.

Ms. R. Phillips said governance comes from funding issues. The library service

area is the County as well. 18% of our users are in the County. We are interested in some governance model that reflects the reality of who is served and funding sources.

Ms. Gilbert asked how do you deal with language barriers.

Mr. Wilson said we would work through that and bring in whatever we need.

Ms. Gilbert asked how do you get to the nonusers.

Mr. Wilson said we try to get 1/3 of the people at a community retreat to be nonusers. We ask nonusers to join our focus groups. All that is helpful. It is about getting a lot of different input and using our expertise.

President Wagner asked why do you want nonusers to come to meetings.

Mr. Wilson said in some cases their input is the most helpful.

Mr. Wilson said governance and facilities are items we would look deeper into per your request.

President Wagner said facilities, public funding and governance are our focus.

Mr. Wilson asked what do you want the deliverables to look like. We would need that.

Ms. L. Phillips said a dashboard tool.

Mr. Wilson said he believes the Library Board should touch on the strategic plan at every meeting. Just a simple one page dashboard that allows Pat to say here is the dashboard, this one moved forward, here are the notes. It should be a flexible and easy snapshot so the Board does not lose contact with strategic plan.

Ms. R. Phillips asked so staff is touching the strategic plan as well.

Mr. Wilson said yes. For the implementation plan we generally recommend to the Board that they see it, but not approve it. It will be a task level plan. It is a work plan. Usually we do a 3 year plan.

President Wagner said he likes the idea of using private support to earn more public support. We need a better liaison and support from Friends.

Mr. Wilson said we have a lot of experience with that. It is critical that the Friends organization advocates for the libraries.

Ms. Schow asked the rapid results retreat, how long will that be. What is the time commitment for the Planning Committee.

Mr. Wilson said the retreat is typically 6 hours and is usually on a Saturday. We ask the library to provide a lunch. It is important to engage people face to face and with low tech. Planning meets as often as they like. Typically 3 to 4 times through the process and some work by email. We draft the work, the library administration gives comments and we redo it then it goes to planning. It is about a 10 to 15 hour commitment.

Ms. Hodapp said Santa Fe is the City different. How do you intend to provide an understanding of City issues. Southside versus northside.

Mr. Wilson said we need to understand basically what is happening. We learn about the community from stats and community engagement and interviews. We look at demographic data and divided communities. We have worked with divided communities before. Needs versus desires. We have to ask the need questions.

Ms. Gilbert said your team is pretty small. How many other clients would you be working on at same time.

Mr. Wilson said we have 3 leads. Each works on a project. Currently we are working on 30 projects ranging from one day to one year projects.

Ms. Gilbert asked what can derail a project like this.

Mr. Wilson said politics and the funding side.

Ms. Hodapp said this is an exciting time. Thank you.

Ms. Hodapp said we will evaluate the 3 proposals today and the evaluations go to the purchasing agent tomorrow. We total the scores here and send them to purchasing and they tell us the number 1 candidate. The Library Board affirms that.

4. DATE OF NEXT BOARD MEETING

MOTION A motion was made by Ms. Gilbert, seconded by Ms. Phillips, to have the next Library Board meeting on May 29th.

VOTE The motion passed unanimously by voice vote.

5. ADJOURNMENT

MOTION A motion was made by Ms. Philips, seconded by Ms. Gilbert to adjourn the meeting.

VOTE The motion passed unanimously by voice vote.

There being no further business before the Board the meeting adjourned at 4:36 pm.

David Wagner, President

Elizabeth Martin, Stenographer

Exhibit 1

21st Century Library Presentation
Santa Fe Public Library
Making a Case for Change

2

Our Team

- Godfrey's Associates, Inc.
- Management Partners
- Buxton Company

We bring multiple perspectives to your project

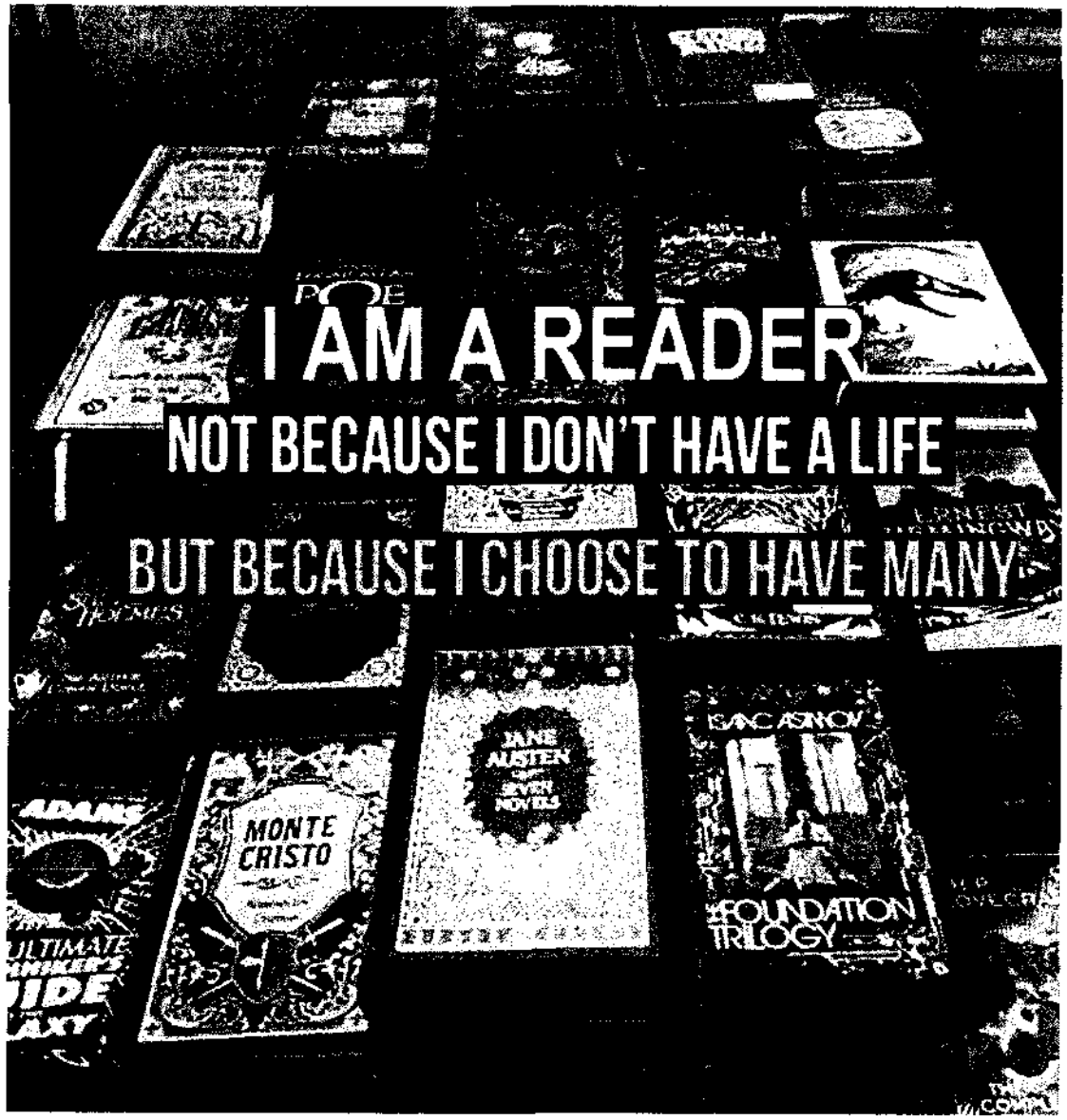
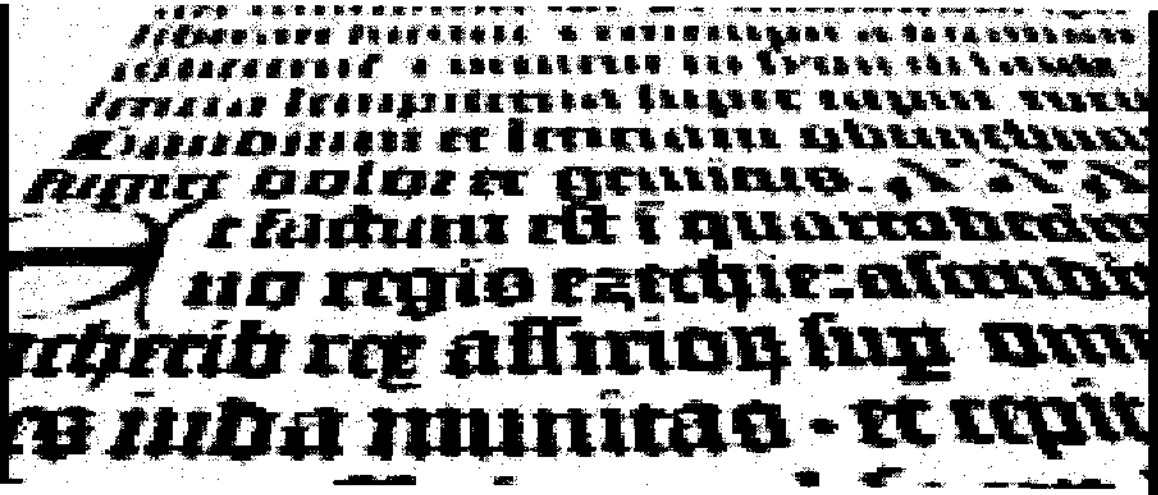


Exhibit "1"

3

Our Vision

- What is here
- What is not here
- What should be here
- What others do well
- What others do not do so well
- Opportunities for improvements

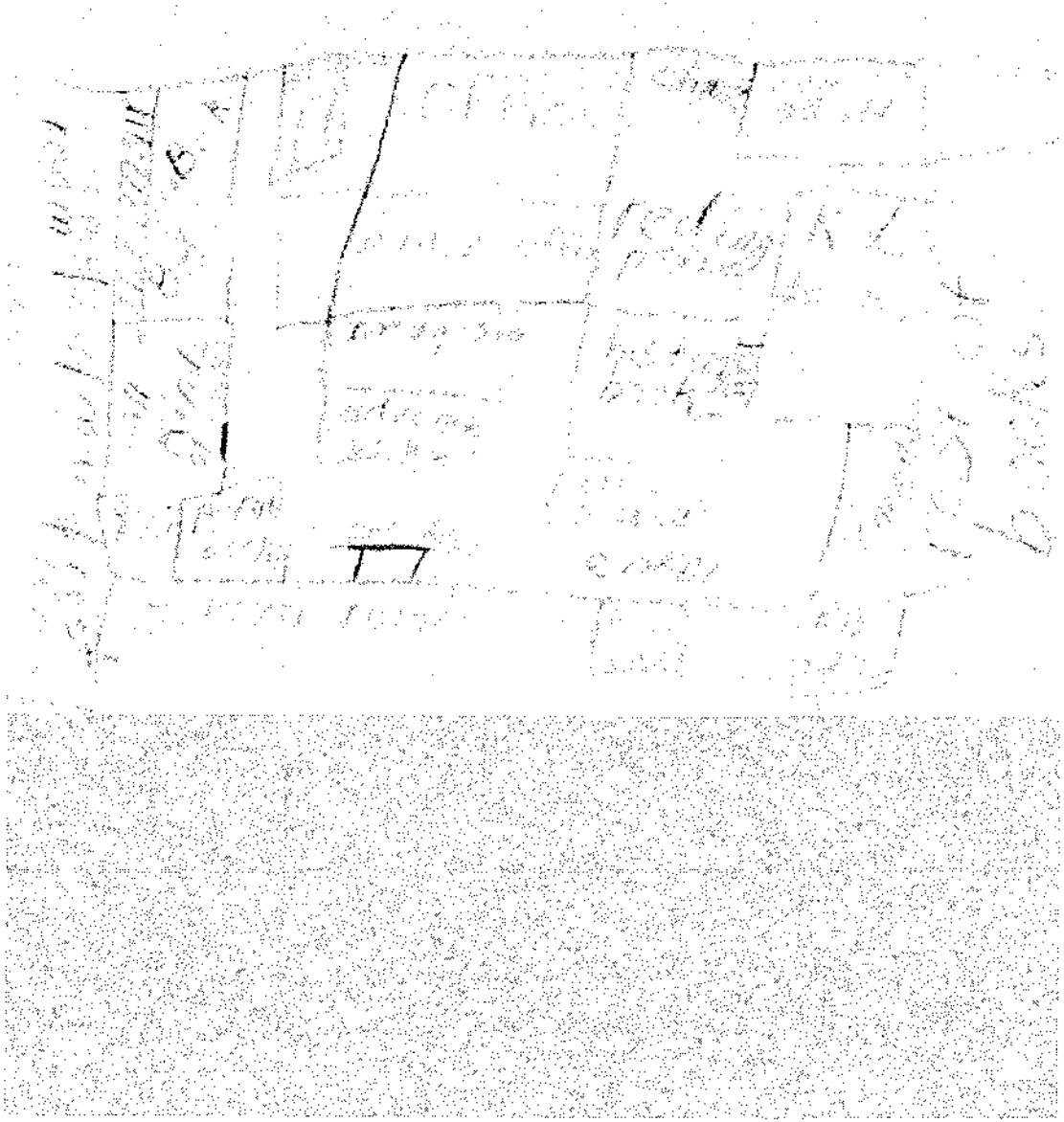


0 Project Orientation & Organization

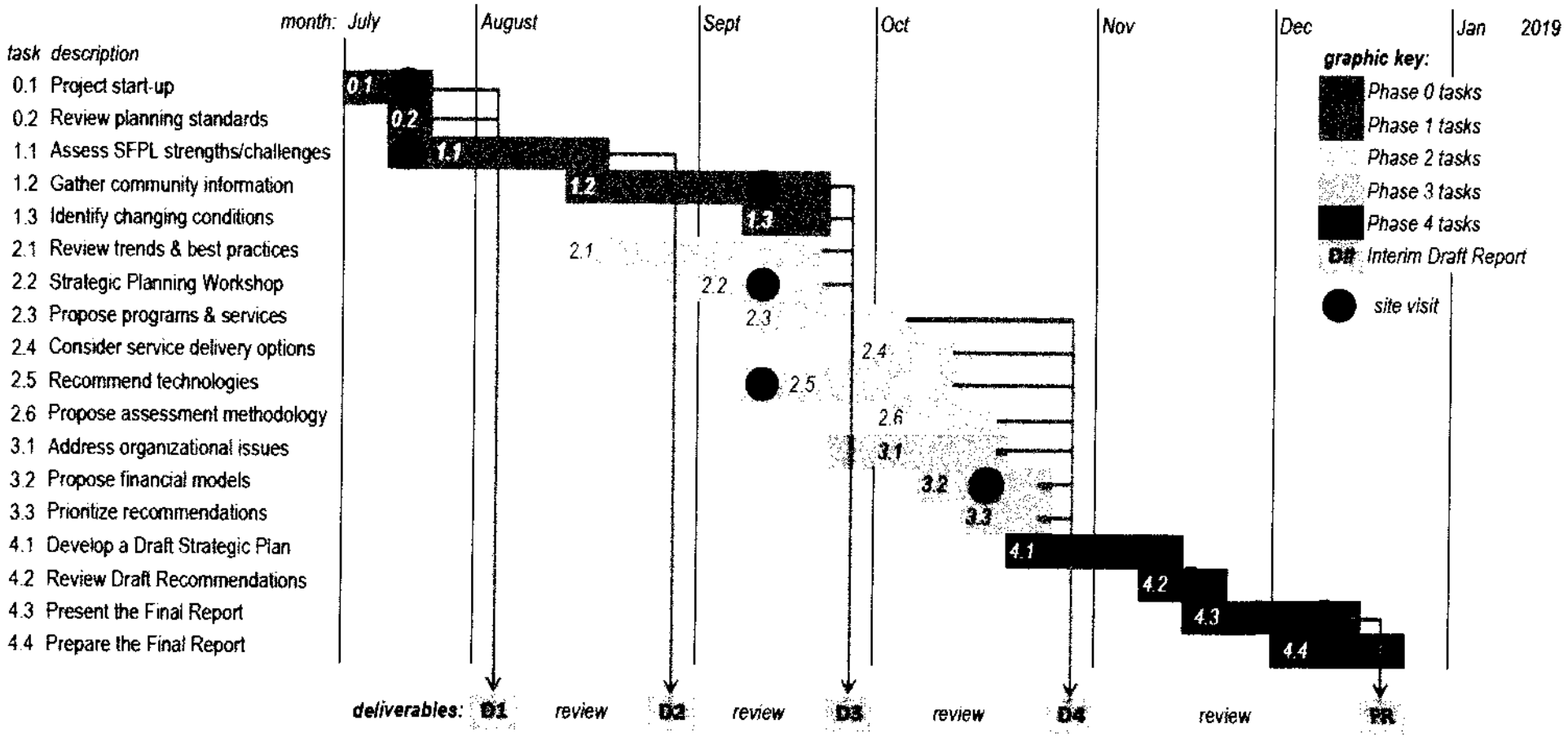
5

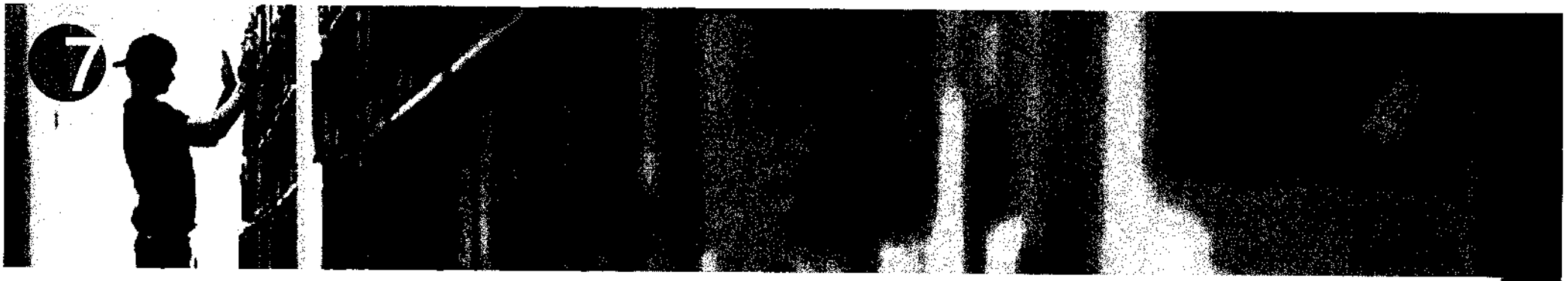
Godfrey's Team Planning

- Deliberate
- Thoughtful
- Fair – standards established from the outset
- Comprehensive
- Pragmatic
- Accurate
- "Just In Time" – no longer "Just In Case"



Project Timeline



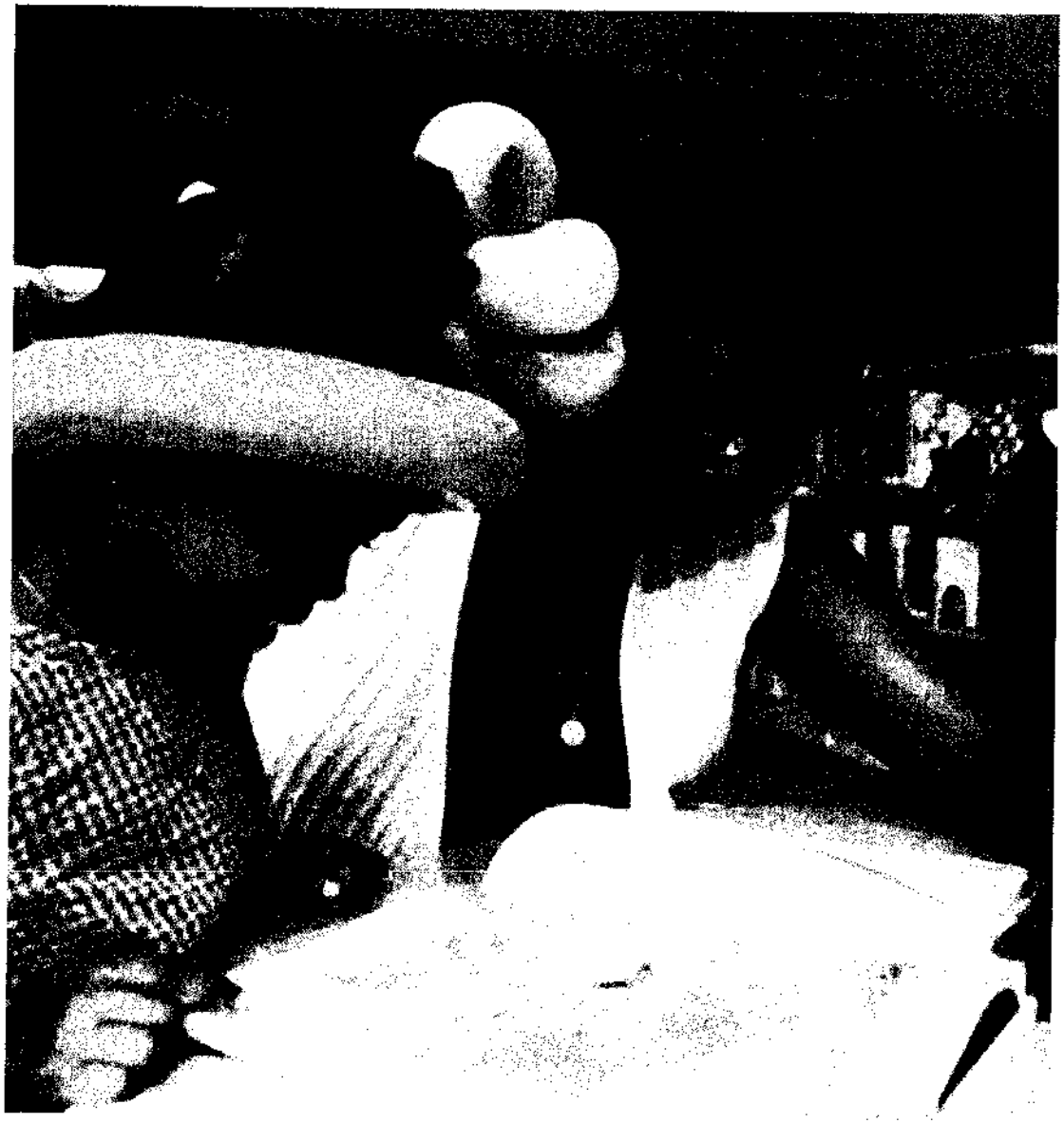


1 Assessment of Current State of SFPL & the Community

8

Phase 1 Tasks

1. Assess current SFPL strengths & challenges with budget, staffing, programs, services, technology & facilities
2. Gather information from the community – including stakeholders & both Library users & non-users
3. Identify changing conditions in the community that impact the locations & service delivery model for SFPL



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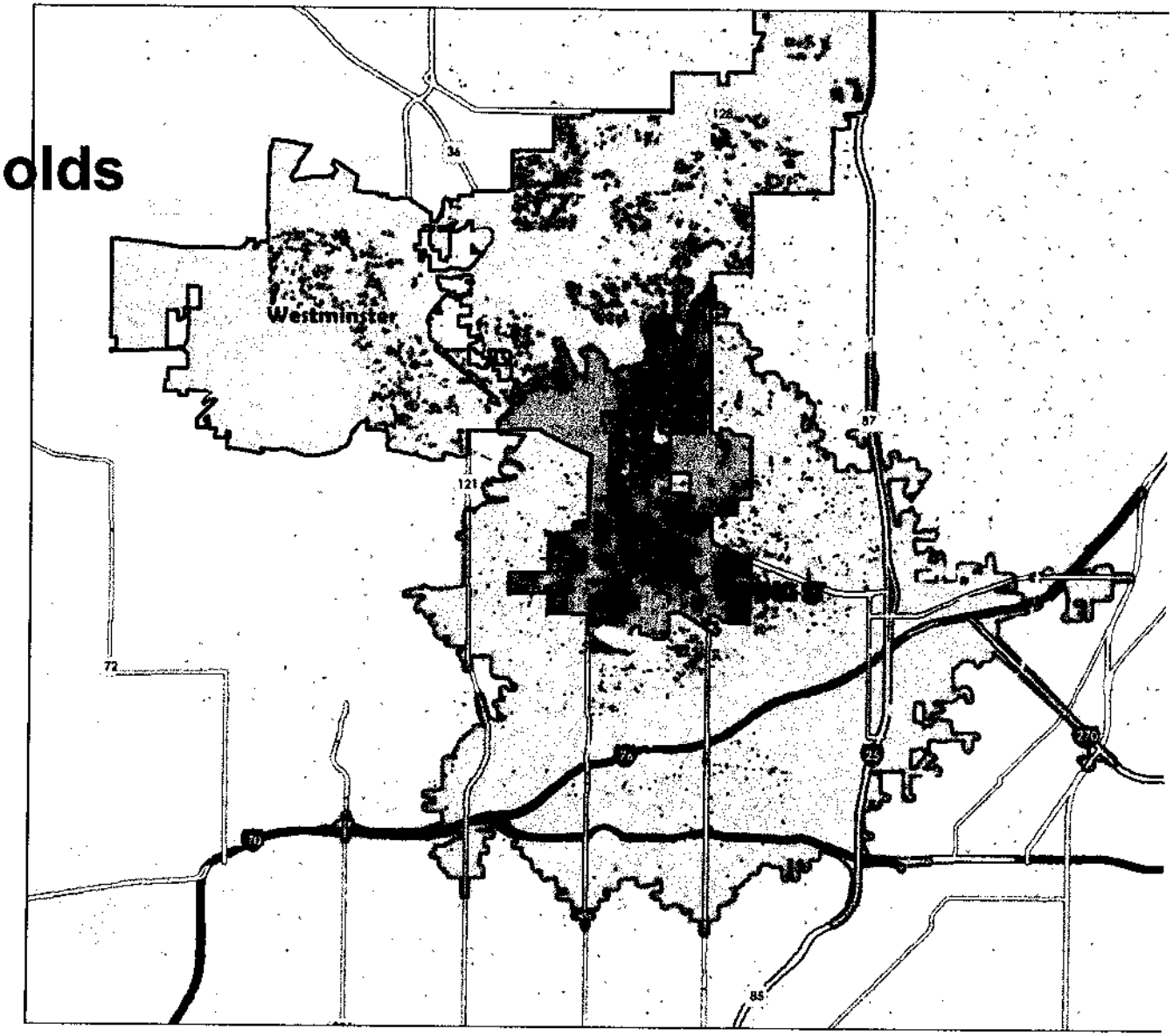
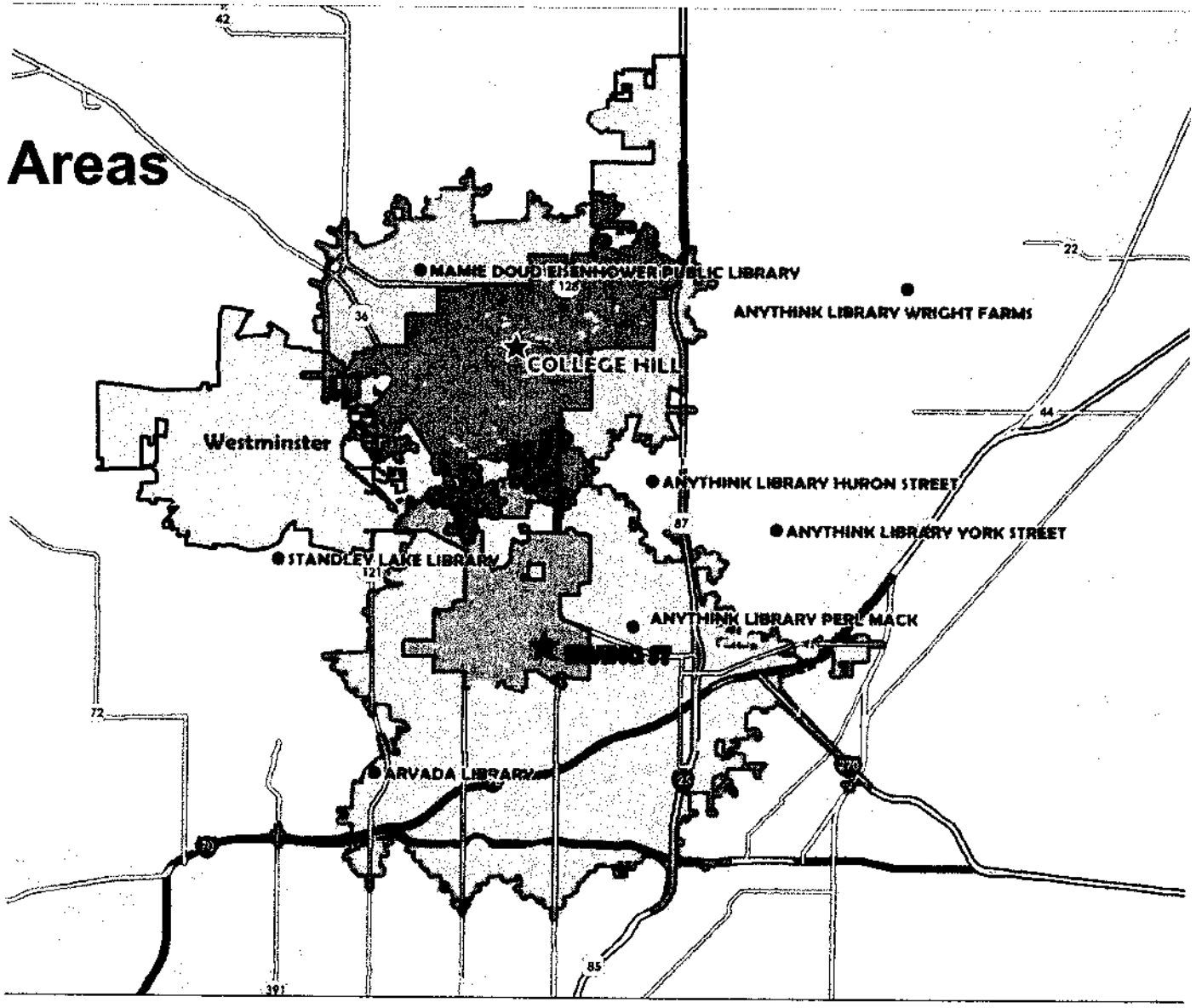
Service Area Households



10

Drive Time Service Areas

- Westminster City Limits
- Irving St Location
- College Hill Location
- Competitors
- Irving St 11-Minute Trade Area
- College Hill - 12 Minute Trade Area
- Irving St Actual Borrowers
- College Hill Actual Borrowers



11

Market Segmentation

A B C D F G H I J K L M N O P Q R S

11 12 13 14

Group C: **Booming with Confidence**

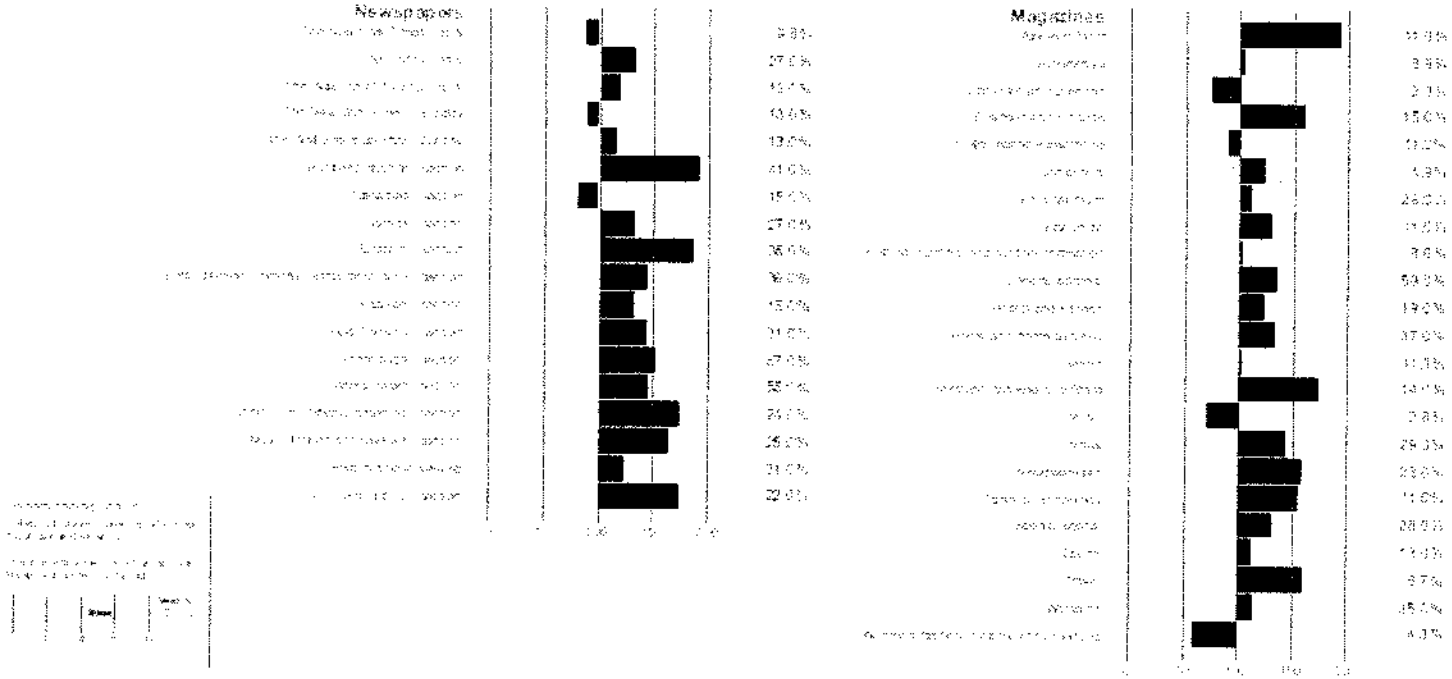
Mark & Kathleen

Type C11: **Aging of Aquarius**

Upscale boomer-aged couples living in city and close-in suburbs

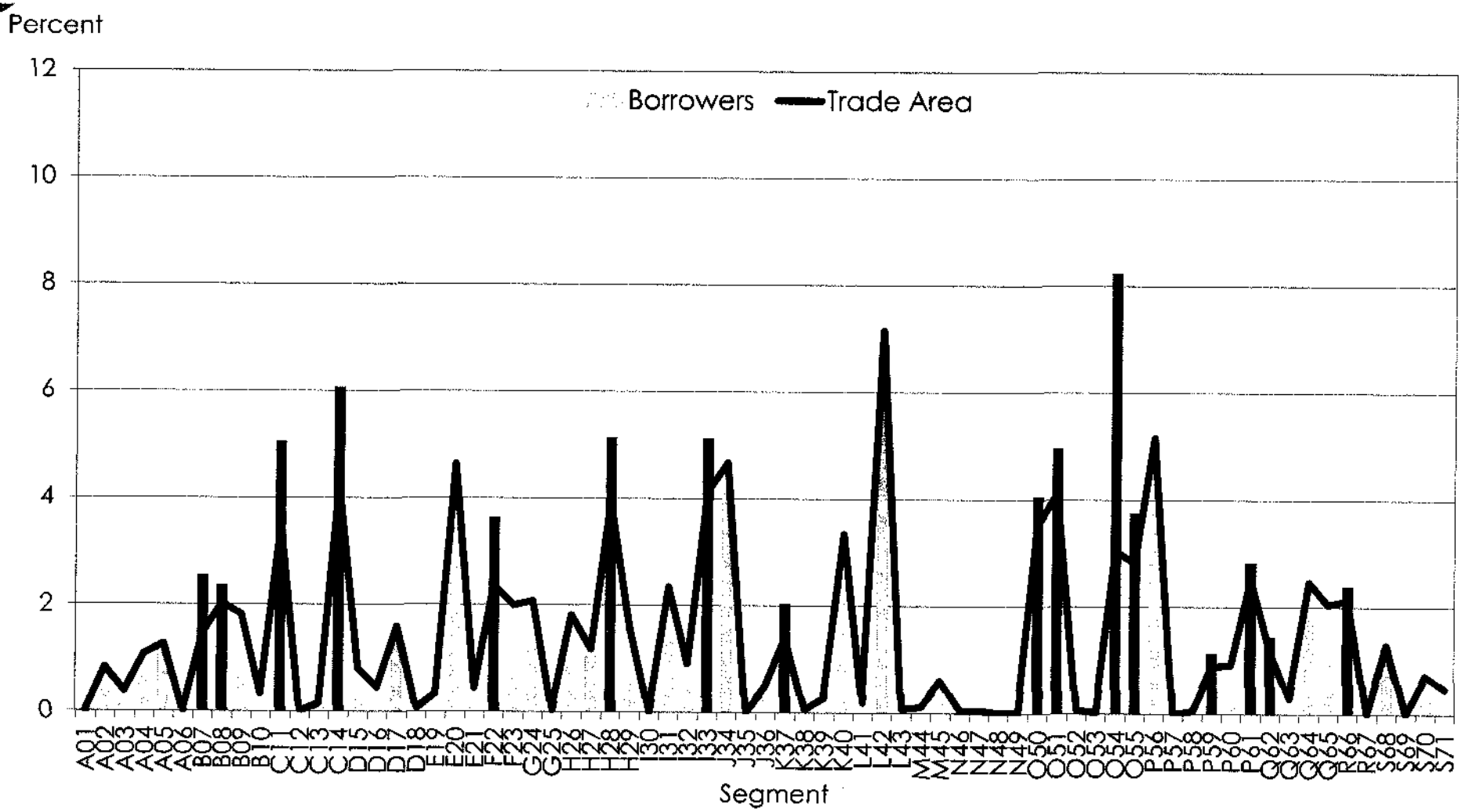
2.34% | 3.26%

How we live our lives

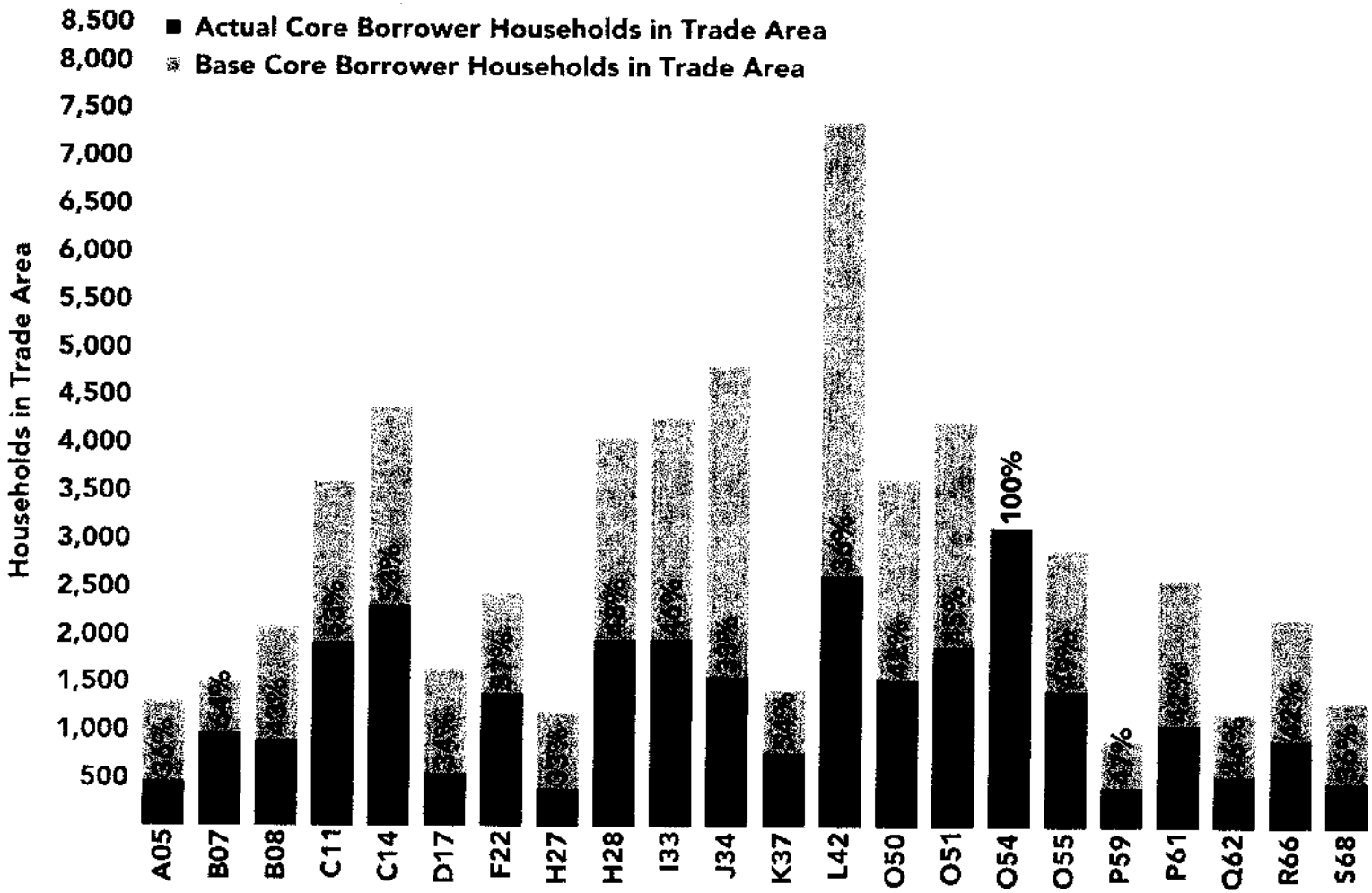


Experian

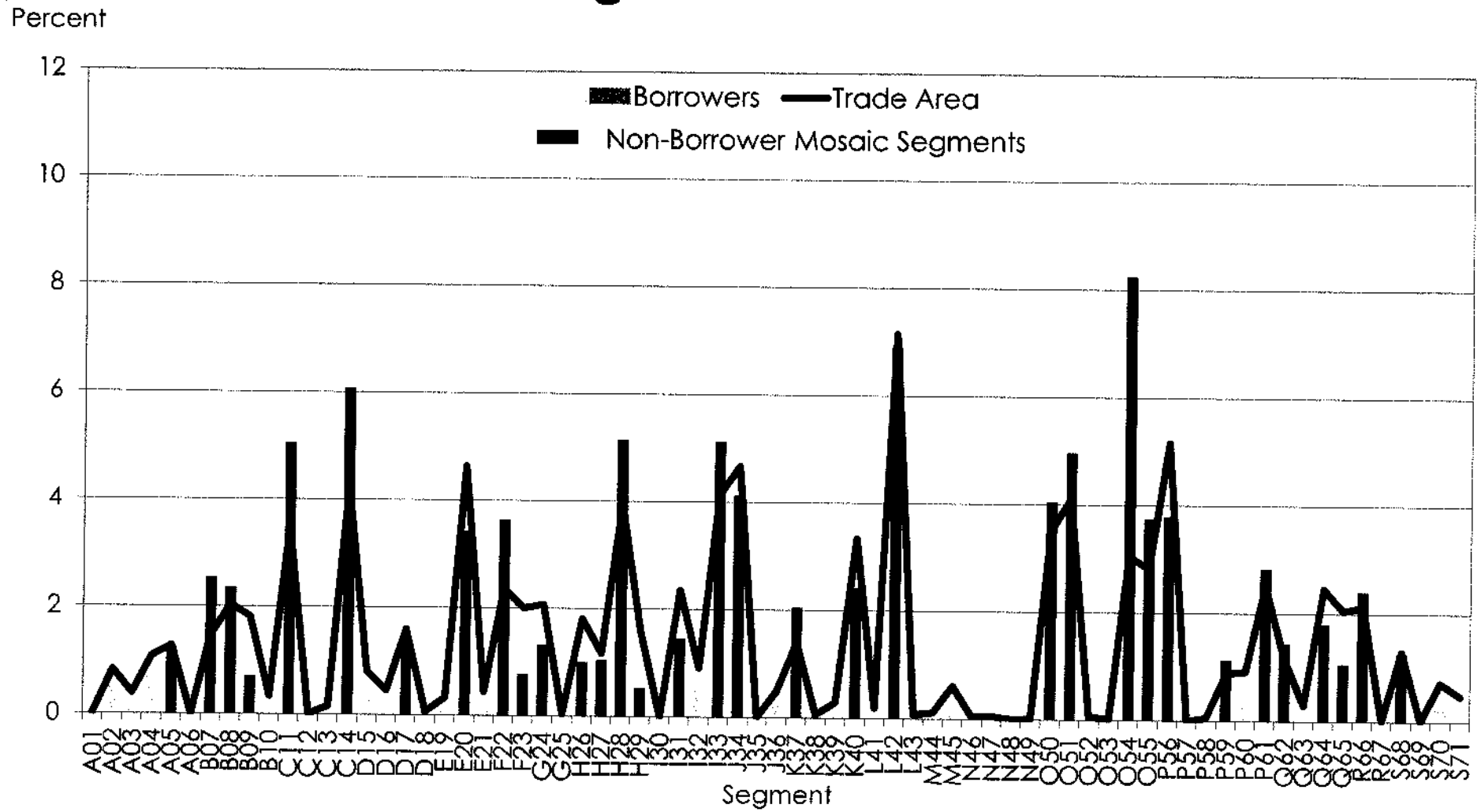
12 Core Customers



13 Market Penetration by Segment



14 Non-User Market Segments



15 Non-User Description Examples

I31: Blue Collar Comfort

Middle-class families in smaller cities & towns with solid blue-collar jobs

Lifestyle Characteristics	Index
Enjoy Spending Time with Family	325
High Consumer Confidence	256
Fly Spirit Airline	170
Shop at Target	152
Stayed at Ramada Hotels	138
Over 75,000 individual categories available	

K40: Bohemian Groove

Older, value-conscious shoppers having eclectic interests, such as, nutrition & music

Lifestyle Characteristics	Index
Enjoy Spending Time with Family	323
Belong to Human Rights Org.	272
Liberal Political Outlook	169
Use Internet to Book Travel	144
Read Entertainment Weekly	133
Over 75,000 individual categories available	

P56: Mid-Scale Medley

Middle-aged, mid-scale income singles & divorced individuals in secondary cities

Lifestyle Characteristics	Index
Have Pets in Household	632
Own PC/Tablet	230
Obtained Medicaid in the Past	158
Visit Sonic Drive-In	130
Wholesale Club Membership	121
Over 75,000 individual categories available	

16 Non-User Description Examples

Q64: Town Elders

Stable, minimalist seniors living in older residences and leading sedentary lifestyles

Lifestyle Characteristics	Index
Obtained Medicare in the Past	322
Belong to AARP	286
Enjoy Spending Time with Family	281
Recently Acquired a Buick	259
Belong to a Church Board	146
Over 75,000 individual categories available	

Q65: Senior Discounts

Downscale, settled retirees in metro apartment communities

Lifestyle Characteristics	Index
Enjoy Spending Time with Family	313
Belong to AARP	176
Grandchild Born	159
Belong to Civic Club	144
Religious Conservative	139
Over 75,000 individual categories available	

Non-User Demographics Report

	Head of Household Age <35 %	Head of Household Age 36-45 years %	Head of Household Age 46-50 years %	Head of Household Age 51+ %	Head of Household African American %	Head of Household Hispanic %	Presence of a Child %	Estimated HH Income <$50K %	Estimated HH Income $75,000-$99,999 %	Estimated HH Income $100,000-$124,999 %
B09: Family Fun-Tastic	8.9%	32.7%	24.0%	34.4%	2.0%	4.5%	55.4%	3.5%	27.0%	17.1%
E20: No Place Like Home	29.2%	4.6%	4.7%	61.5%	0.9%	4.6%	12.9%	17.8%	23.9%	12.5%
F23: Families Matter Most	65.7%	27.3%	4.1%	2.9%	5.3%	10.1%	96.9%	19.6%	26.8%	8.9%
G24: Status Seeking Singles	33.2%	39.7%	15.6%	11.5%	3.6%	5.3%	10.2%	26.1%	17.1%	10.4%
H26: Progressive Potpourri	7.3%	18.4%	15.9%	58.3%	1.1%	31.1%	22.7%	26.6%	18.9%	11.7%
H29: Destination Recreation	1.3%	60.8%	34.7%	3.2%	1.0%	7.2%	22.2%	39.9%	12.7%	8.4%
I31: Blue Collar Comfort	9.0%	32.3%	24.3%	34.4%	0.3%	5.8%	71.9%	22.7%	21.6%	8.0%
K37: Wired for Success	26.4%	33.6%	16.6%	23.3%	1.9%	10.4%	23.7%	50.2%	7.1%	9.4%
P56: Mid-Scale Medley	6.4%	43.9%	28.1%	21.6%	1.0%	12.2%	28.9%	57.6%	10.7%	5.2%
Q64: Town Elders	0.0%	0.0%	0.1%	99.9%	9.4%	4.5%	0.4%	83.0%	4.3%	2.2%
Q65: Senior Discounts	0.3%	0.6%	1.3%	97.8%	6.9%	5.0%	1.6%	85.0%	4.2%	3.6%

18 Community-Centric Approach

Facilities Assessment

Table 4 Existing Building Retrofit Costs, Springdale Public Library

built: | nasf: 35,124.0 | renovate: 2014 | bgsf: 43,800.0 | addition: 2014 | 5/16/18 12:48 PM

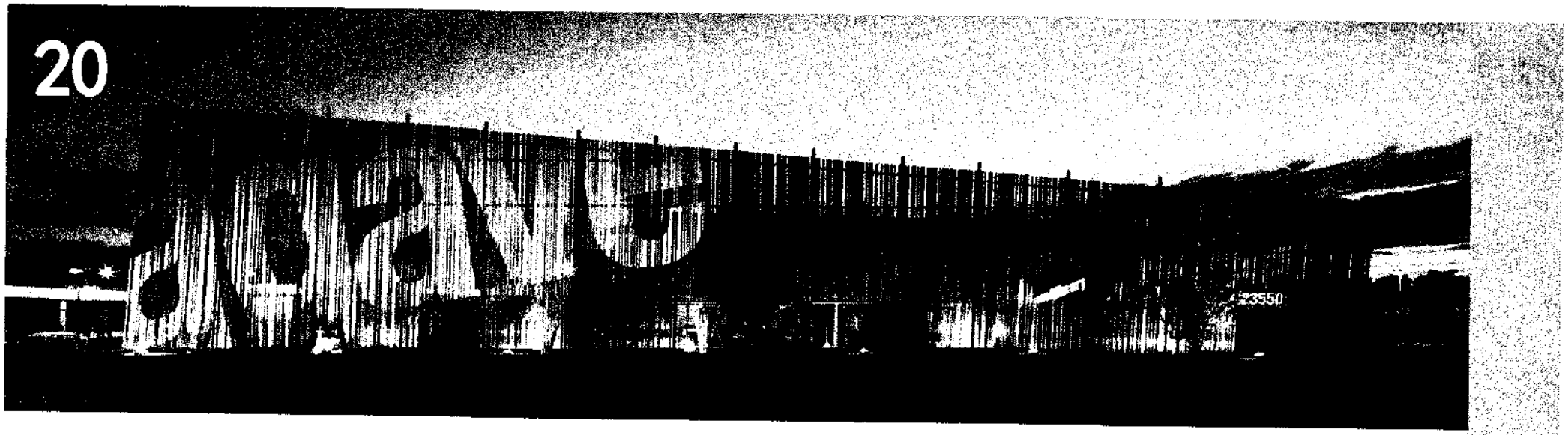
Retrofit the Building Systems

42,623.0

4.64 *overall facility rating*

element code	*element*	*rating*	*weight factor*	*square footage*	*unit cost*	*total cost*	*comments*
A1010	Foundations	5.0	0%	43,800 bgsf	$6.79	$0	
B1010	Floor slabs	4.0	20%	43,800 bgsf	3.45	30,178	address heaving in original biulding
B1020	Superstructure	5.0	0%	43,800 bgsf	16.19	0	steel roof joists
B2010	Exterior walls	4.9	2%	43,800 bgsf	15.02	13,153	repair stucco & repaint
B2020	Exterior windows	5.0	0%	43,800 bgsf	10.54	0	
B2020	Skylights	4.7	6%	43,800 bgsf	2.60	6,833	replace old sealant & paint
B2030	Exterior doors	4.8	4%	43,800 bgsf	6.31	11,046	replace old sealant & sweeps & paint
B3010	Roofing	2.5	50%	43,800 bgsf	12.00	262,778	apply new insulation & membrane over existing
D5030	Building security system	5.0	0%	43,800 bgsf	0.43	0	
D5040	Fire alarm system	5.0	0%	43,800 bgsf	2.28	0	
D5040	Emergency power	N/A	0%	43,800 bgsf	2.16	0	not code-required but should be considered
E2010	Casework	4.4	12%	35,124 nasf	2.35	9,913	repair or remove, as needed
E2010	Millwork	5.0	0%	35,124 nasf	7.51	0	
E2020	Furniture	5.0	0%	35,124 nasf	18.41	0	
E2020	Shelving	5.0	0%	35,124 nasf	9.86	0	
E2020	AV Equipment	5.0	0%	35,124 nasf	7.87	0	
E2020	Signage	4.8	4%	43,800 bgsf	5.85	10,249	replace pedestal sign w/ electronic
G2010	Roadways	4.7	6%	43,800 bgsf	2.37	6,218	repair cracks
G2020	Parking Lots	4.7	6%	43,800 bgsf	3.55	9,327	repair cracks
G2030	Pedestrian Paving	5.0	0%	43,800 bgsf	7.50	0	
G2040	Site Development	5.0	0%	43,800 bgsf	1.85	0	
G2050	Landscaping/hardscape	5.0	0%	43,800 bgsf	2.64	0	
G3000	Site Utilities	5.0	0%	43,800 bgsf	1.87	0	
Z1010	Handicapped access	4.9	2%	43,800 bgsf	3.25	2,847	modify service desks to be ADA compliant

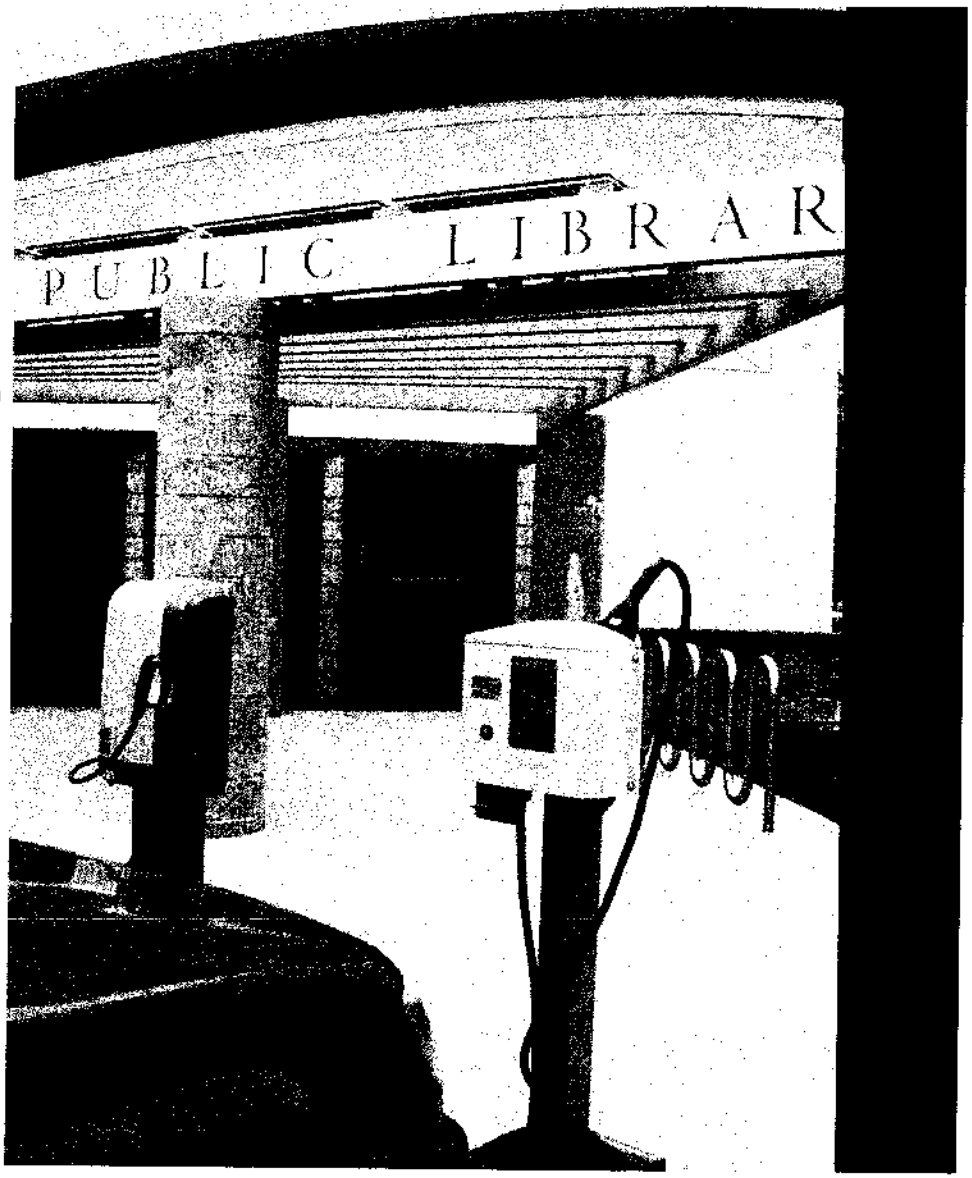
Percentage of new construction	7.1%	New Building Cost/SF	$255.45	$692,264	Sub-Total Retrofit Cost
Cost per square foot	**$18.18**	Contractor overhead/profit	$103,840	**$796,103**	**Total Retrofit Cost**
Overall facility rating (including OH & P)	4.64	Furniture & equipment	$32.13	$10,249	
		Total Cost w/out FF&E	$223.32	$785,854	



2 Recommendations for Improvements to Services with Prioritized Timeframe

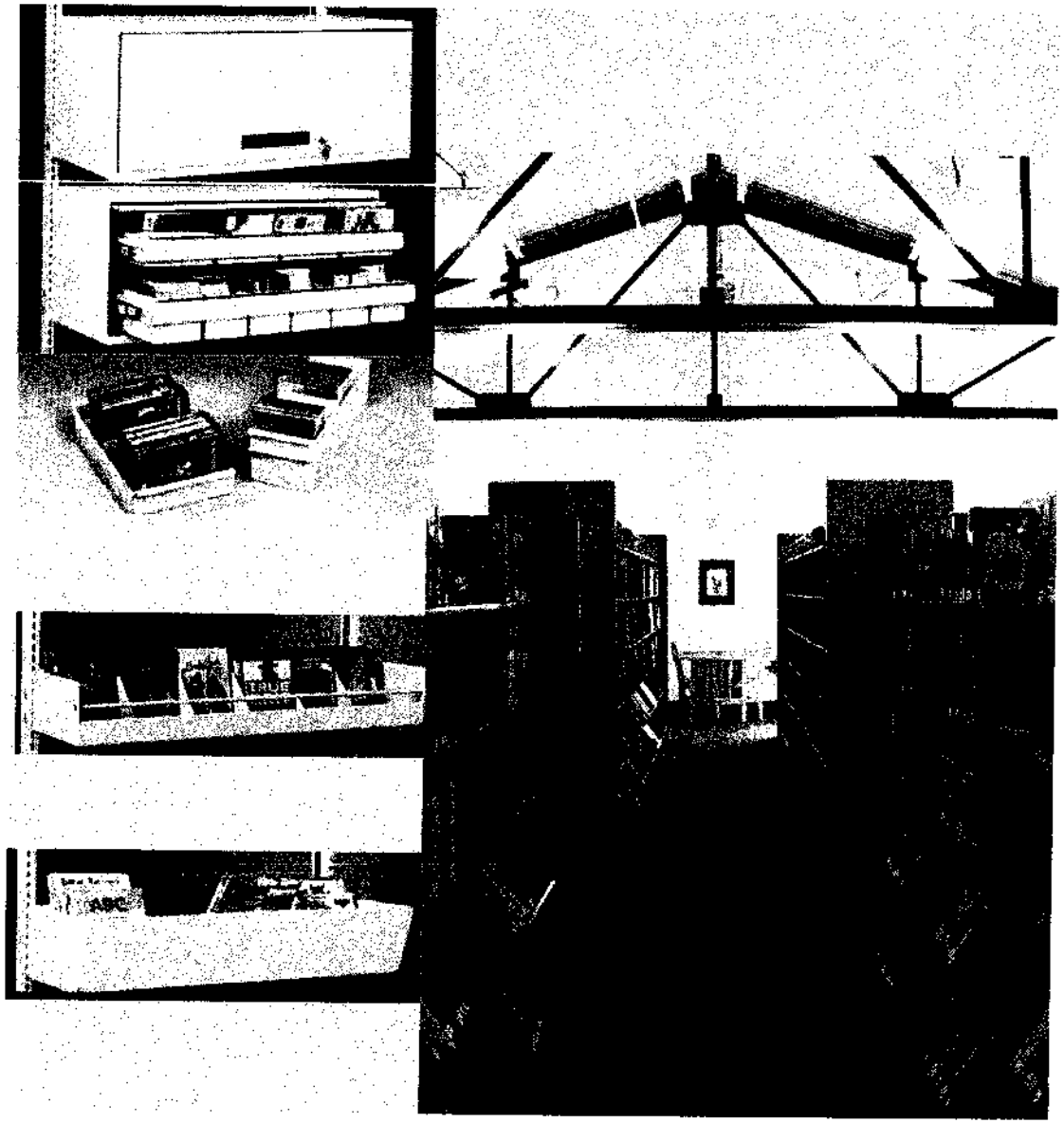
21 Phase 2 Tasks

1. Review current trends & best practices in library service, facilities, staffing, programming, technology & fiscal sustainability
2. Prepare and facilitate a Strategic Planning Workshop
3. Propose programs, services & partnerships to meet the diverse needs of the community
4. Consider buildings, other service delivery models & locations to support proposed programs & services
5. Recommend technologies to improve, enhancing the current customer experience while attracting new users
6. Propose assessment methodologies with appropriate tools for ongoing milestone measurement, goal achievement & future strategic planning



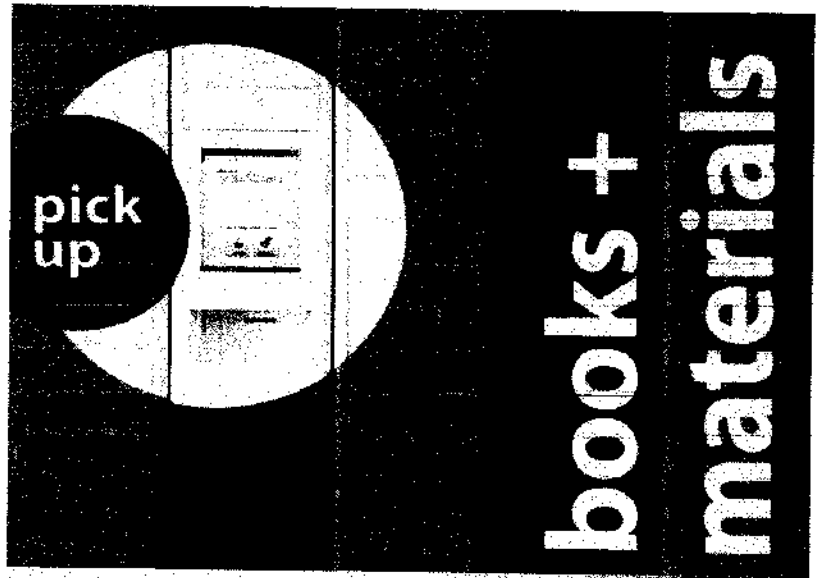
22

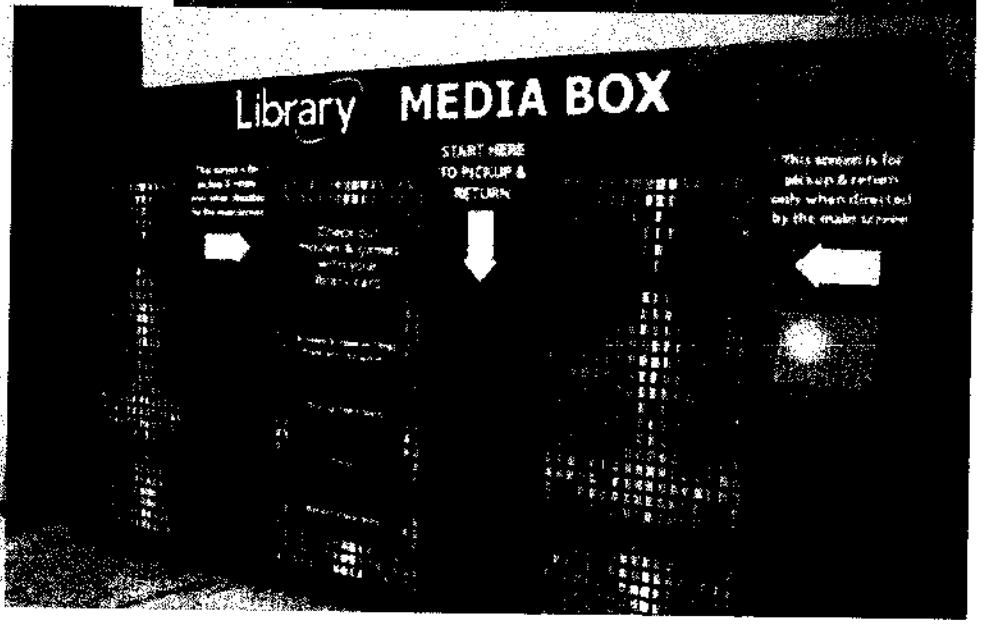
Trends in Service Delivery



Potential for 24/7 Service

- Card Access
- Lending Lockers
- Library "Red Box"
- Express Computers
- Café

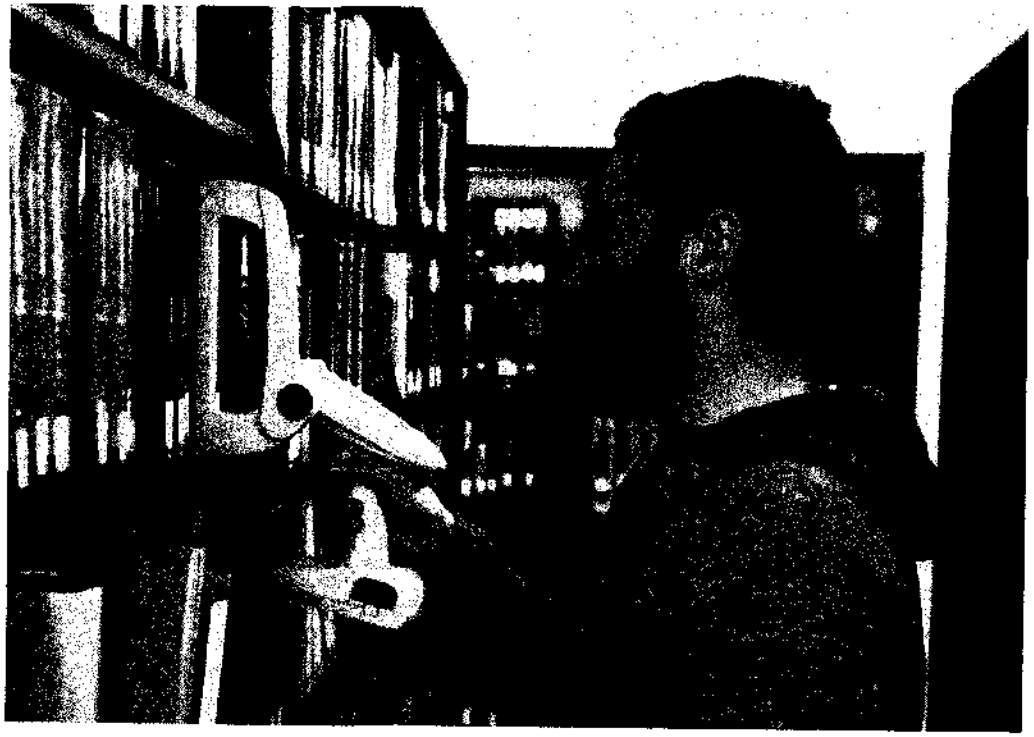


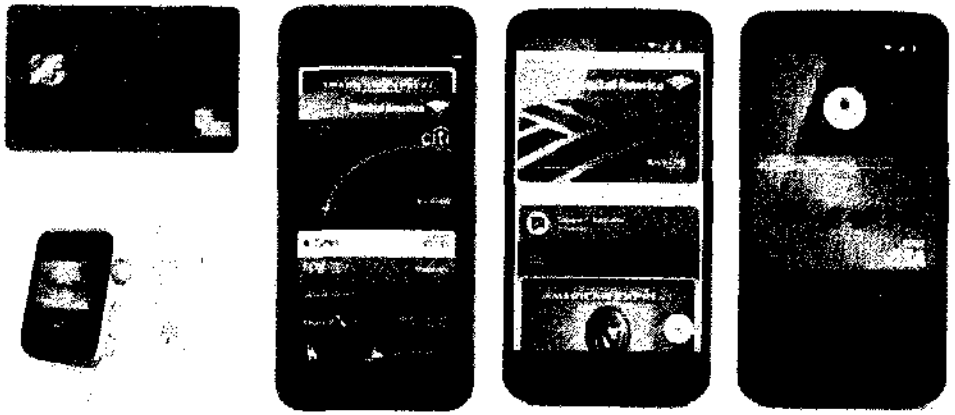


24

Roving Public Services Staff

- Staff with smart phablets
- Meeting customers as they enter the space
- Based out of a co-located staff workroom, one on each floor
- Utilizing small but prominently located service desks on lockable casters for periodic mobility
- Self-service on each floor, including e-commerce

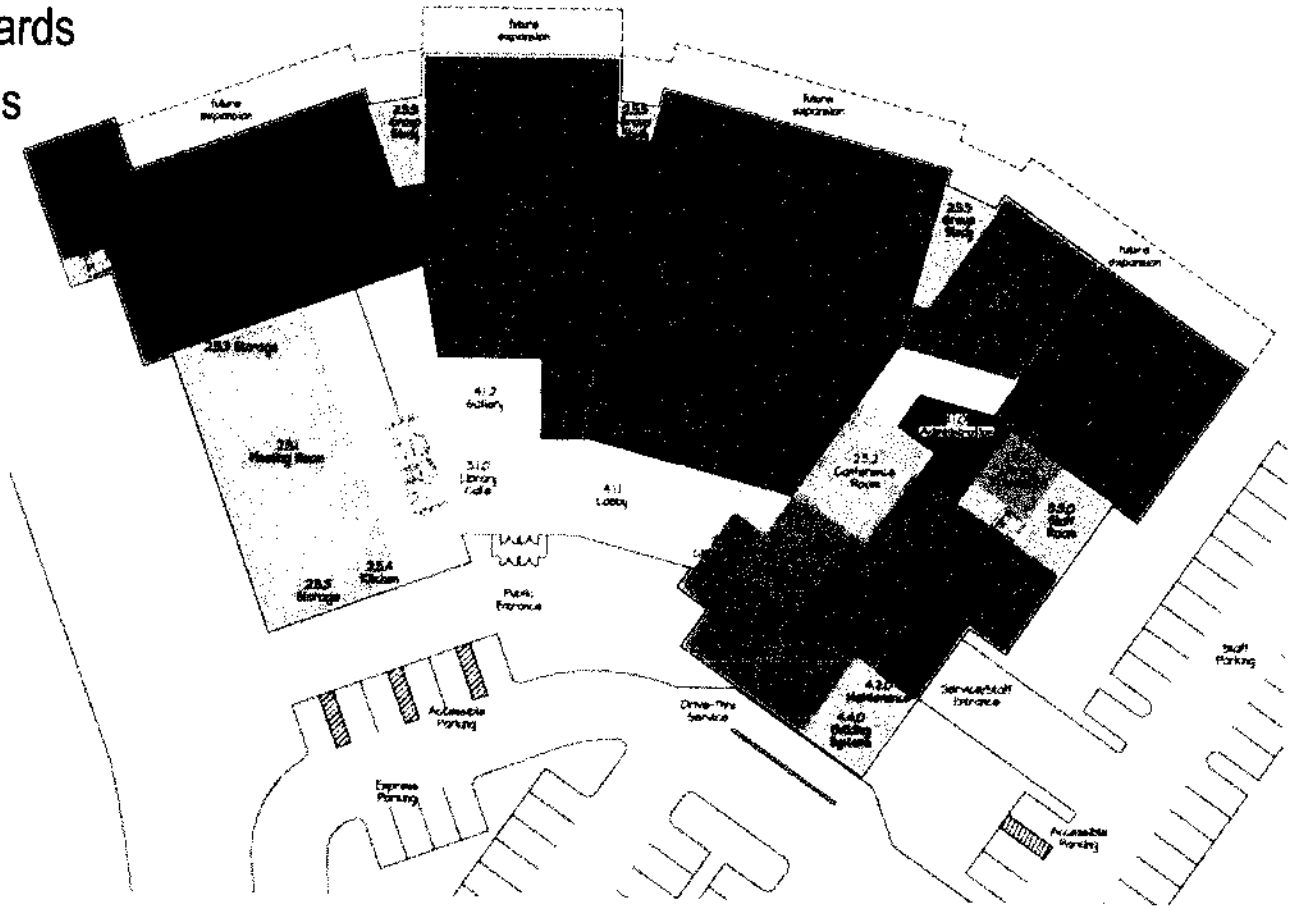




25

Plan-Supporting Facilities

- Space needs projections to standards
- Reuse potential of existing libraries
- New service outlet locations
- New service outlet types



Evaluating New Sites

- Fill-in geographic & service gaps
- Bricks & mortar & alternative models
- Most convenient for existing & potential customers
- Services mix

Branch: DIAMOND HILL/JARVIS
Address: 1300 NE 25TH ST
City, State: FORT WORTH, TX
DMA: Dallas-Ft.Worth
BUDS: Suburban (3)

Score: 122

Date Scored: 12/22/2009
Total SQFT: 8,000
Trade Area (Minutes): 7

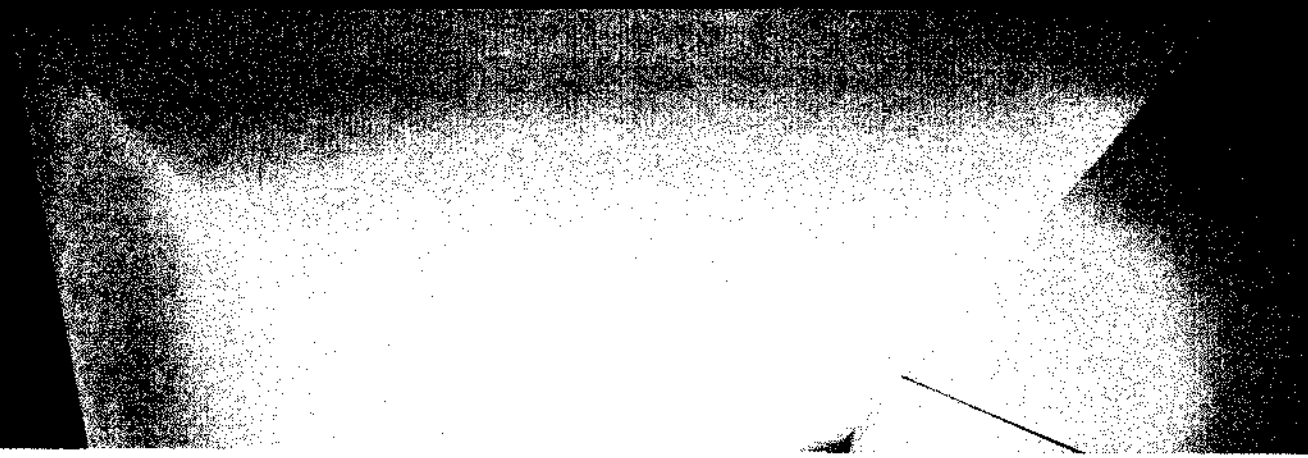
Profile Indices	Average	Site
Active Borrower	100	[illegible]
Adult Fiction	100	[illegible]
Adult Non-Fiction	100	[illegible]
Best Sellers	100	[illegible]
Books on CD	100	[illegible]
Children's Fiction	100	122
Children's Non-Fiction	100	[illegible]
Door Counts	100	[illegible]
DVD	100	[illegible]
Juvenile DVD	100	[illegible]
Music CDs	100	121
PC Logins	100	[illegible]
Picture Books / Easy Readers	100	[illegible]
Reference	100	[illegible]
Remote Users	100	[illegible]
Spanish Materials	100	[illegible]
Teen	100	[illegible]

Demographics	Average	Site
Households	30,450	[illegible]
Active Borrowers	11,886	[illegible]
Active Borrower Penetration Percent	41.6	[illegible]
Five Year Population Growth Percent	5.0	[illegible]
Percent HH with Children	40.5	[illegible]
Percent Asian	3.1	[illegible]
Percent Black	23.1	[illegible]
Percent Hispanic	39.8	[illegible]
Median HH Income	$41,401	[illegible]

3 Recommendations for Improvements to Governance & Fiscal Sustainability

Phase 3 Tasks

1. Address organizational issues that include the relation of SFPL to other regional libraries, the service delivery area & long-term fiscal sustainability
2. Propose governance & operating models that comply with fiscal goals
3. Propose financial models that provide stable, sustainable funding for SFPL operations & implementation of the Strategic Plan
4. Prioritize recommendations with implementation strategies for SFPL governance

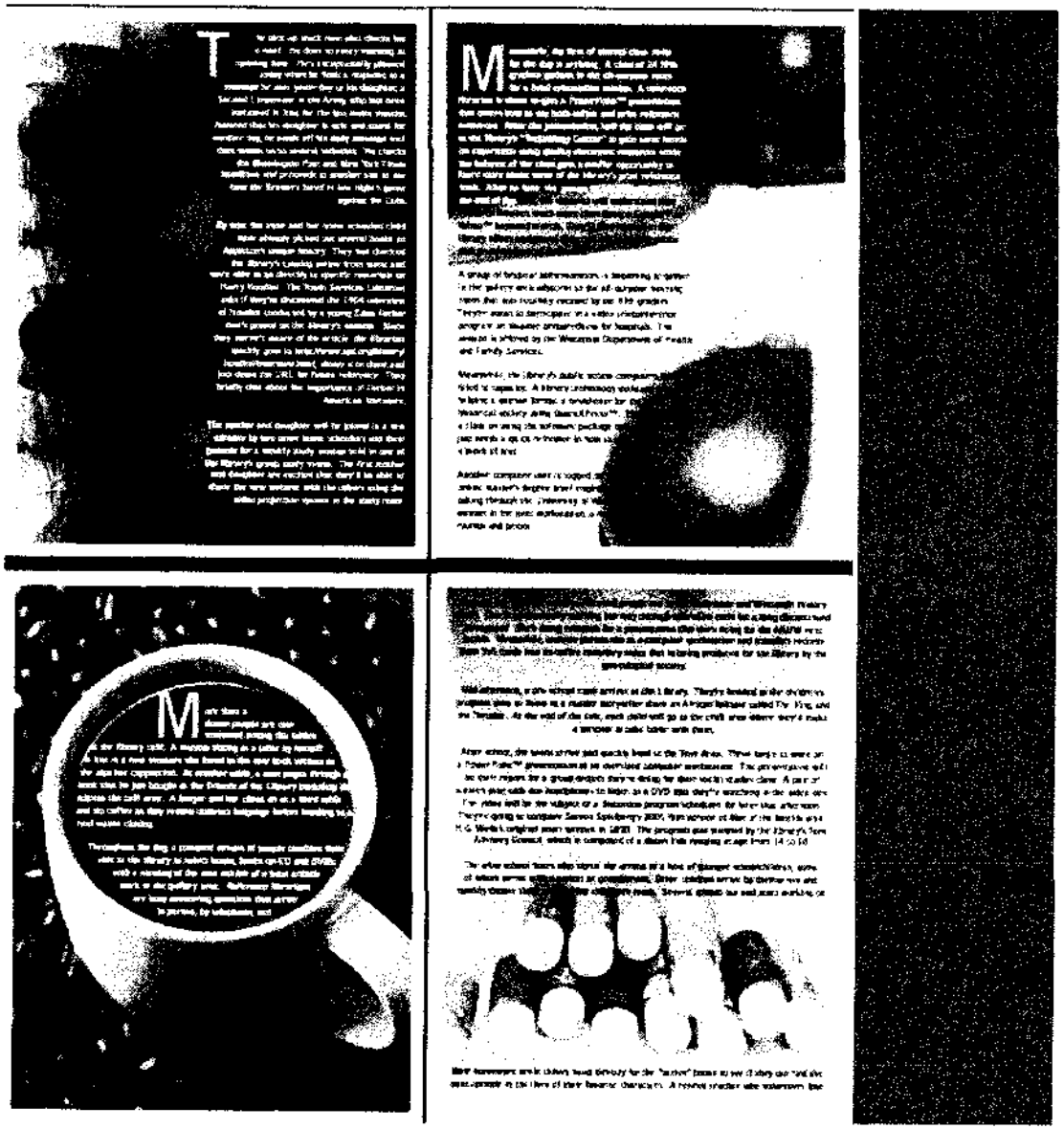


4 Document & Present Findings & Recommendations

30

Phase 4 Tasks

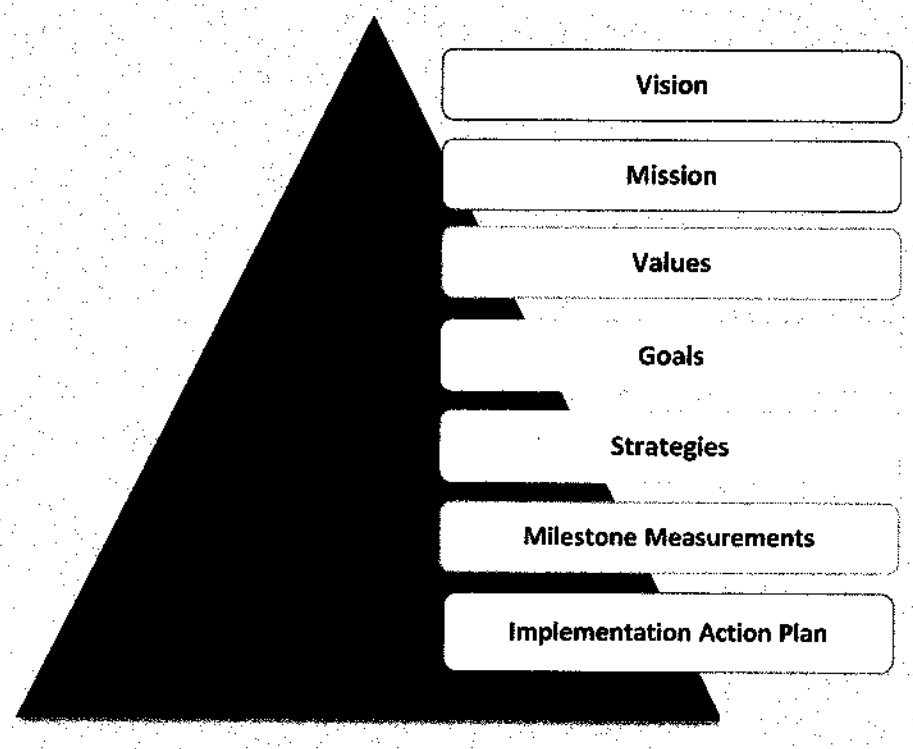
1. Develop a draft strategic 21st century Plan with recommendations
2. Review the draft Plan with staff on-site
3. Present the Final Plan to the Library Board, staff, and City Council
4. Incorporate all feedback into the Final Plan



31

Project Outcomes

- Benchmark standards
- Measurable goals
- Action plans for implementation
- Tools for gauging compliance



the end

Tinwork by Jenny Romero

Santa Fe Public Library

Community Services Department, City of Santa Fe, New Mexico

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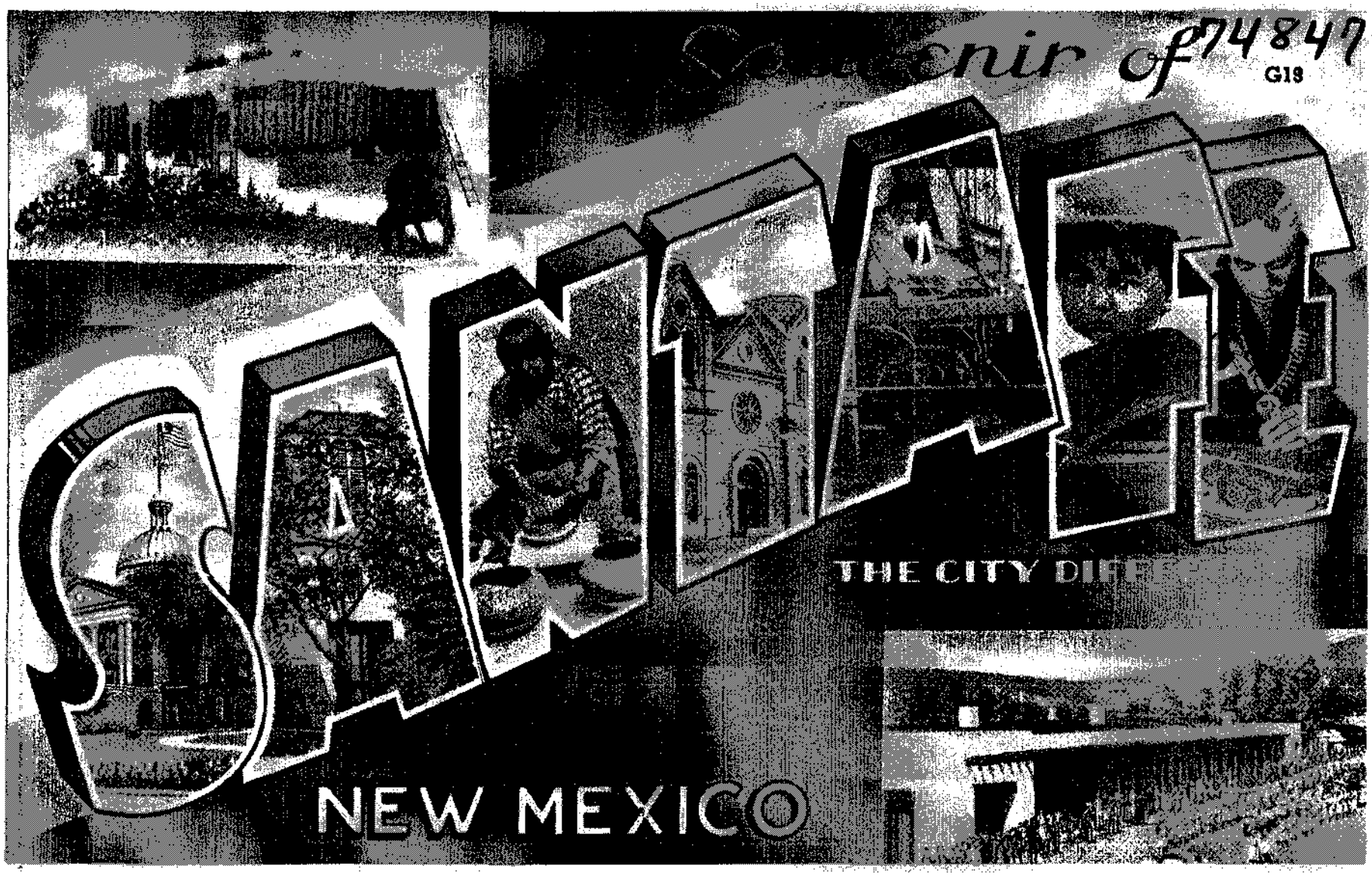
Exhibit 3

IVY GROUP

STRATEGIC PLANNING
SANTA FE PUBLIC LIBRARY

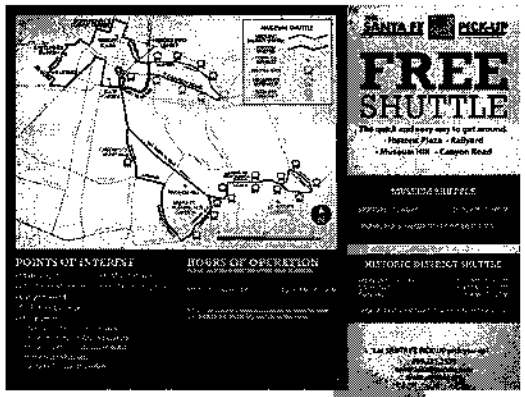
GREETINGS from
VIRGINIA


Souvenir of 74847
G18
SANTA FE
THE CITY DIFF
NEW MEXICO

CREATIVITY ABOUNDS

THE CITY IS ACTIVE AND ENGAGED

Sustainable Santa Fe



BIKE WEEK
MAY 12-20 2018

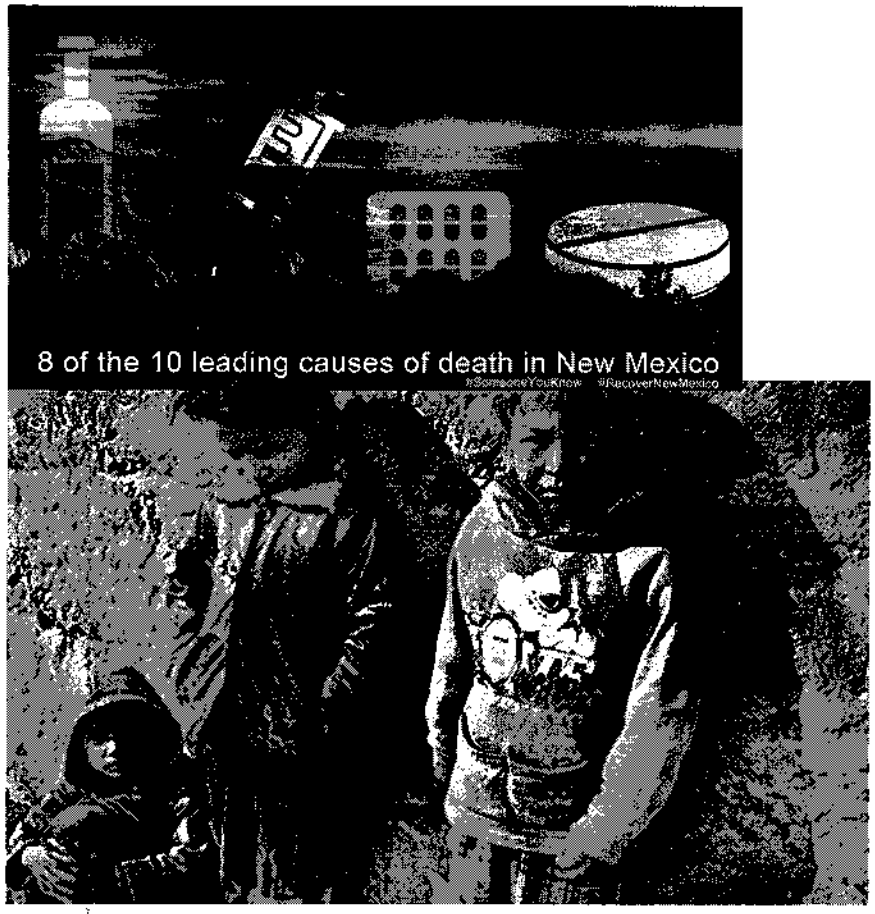
City of Santa Fe
El Día De La Gente - 25th Annual
COMMUNITY DAY 2018
Saturday May 12, 2018
Santa Fe Plaza

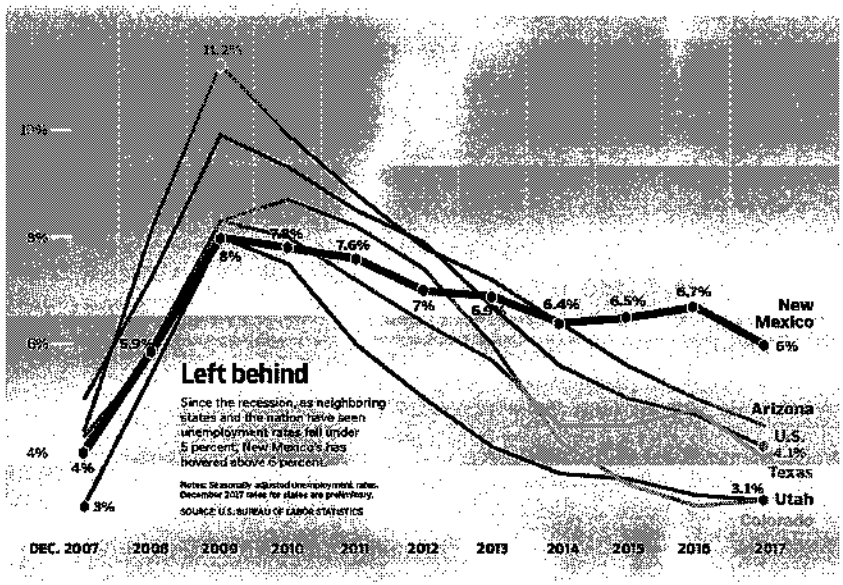
SF+ STARTUPS

THE CITY OF SANTA FE
ARTS COMMISSION

FLY SANTA FE
Gateway to Northern New Mexico

THE CHALLENGES ARE REAL





Graduation rate Santa Fe Public Schools dropped to **69%**, below the statewide rate of **71.1%**, and the national average of **83%**.Feb 24, 2018

COMPARED TO NEW MEXICO, SANTA FE IS...

- Older
- Wealthier
- Better educated
- Less diverse
- More densely populated

BELOW THE POVERTY LEVEL...

- 13% are native born
- 22% of foreign born residents
- ~27% of children
- 49% are nuclear family households
  - 44% work part time
- 47% are single female households

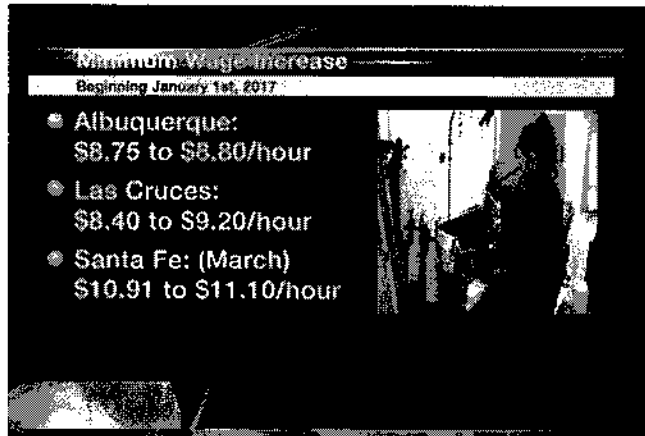
THE CITY'S POOR

- 31% identify as mixed or "other" race
- 18.4% are Hispanic
- 16% are Native Hawaiian
- 14.5% are American Indian
- 9.6 are White
- 6.1% are Asian
- 3.6% are Black

BELOW THE POVERTY LEVEL...

- The poorer the household, the older the housing stock (exception: very new units)
- Unemployment has declined by almost 50% in the last ten years
- As America's poverty rate has slightly declined, New Mexico's has slightly increased

BUT...THE OPPORTUNITIES ARE HERE



Opportunity
Santa Fe
Birth to Career

"We are the most democratic institution there is left in the United States. Everything is free and our middle name is public."

—*Patricia Hodapp*

TRENDS AND BEST PRACTICES

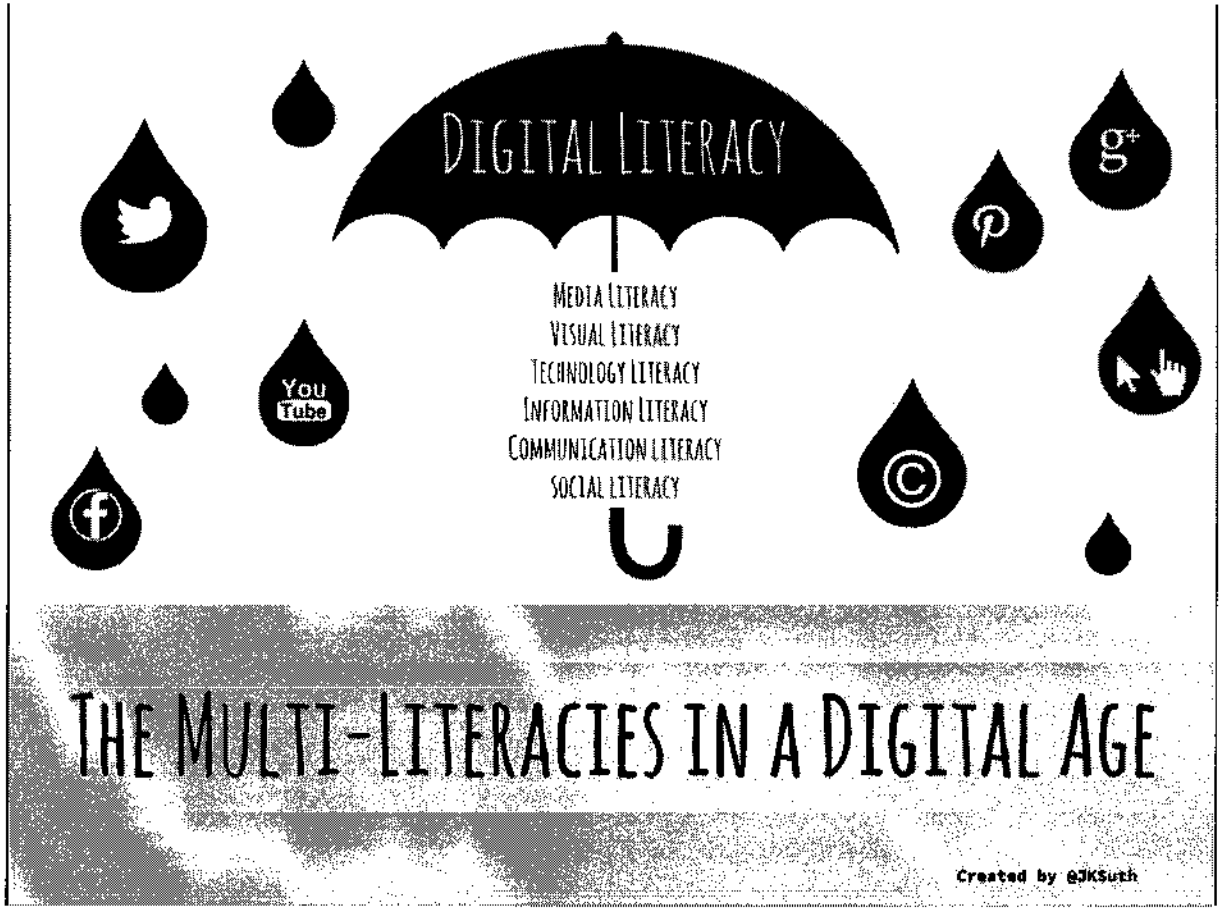
DIGITAL NATIVES VS. DIGITAL IMMIGRANTS

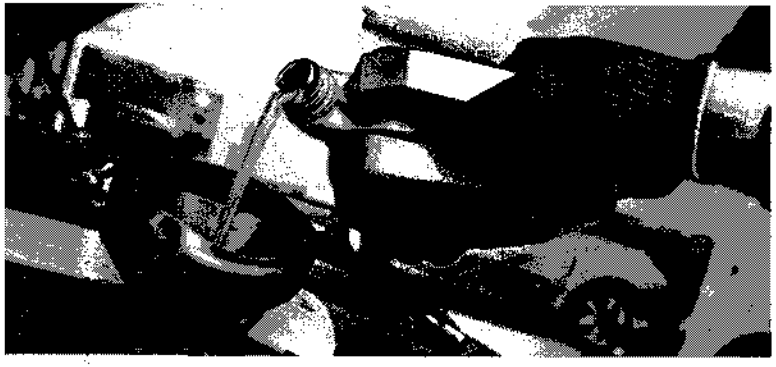
KEEPING UP WITH TECHNOLOGY

PERSISTENT DIGITAL DIVIDE

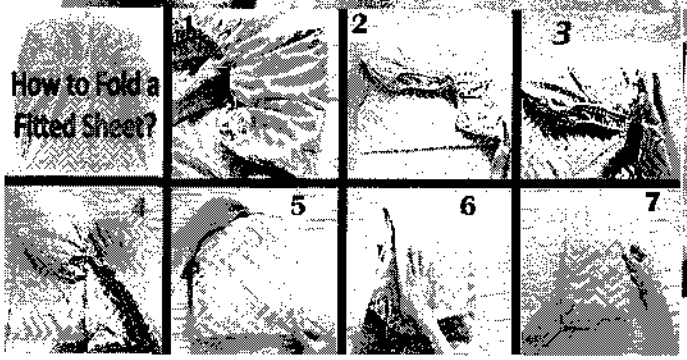
THE SUMMER SLIDE

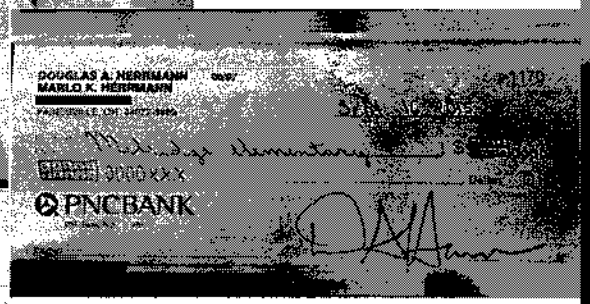
MULTI-LITERACIES





ADULTING





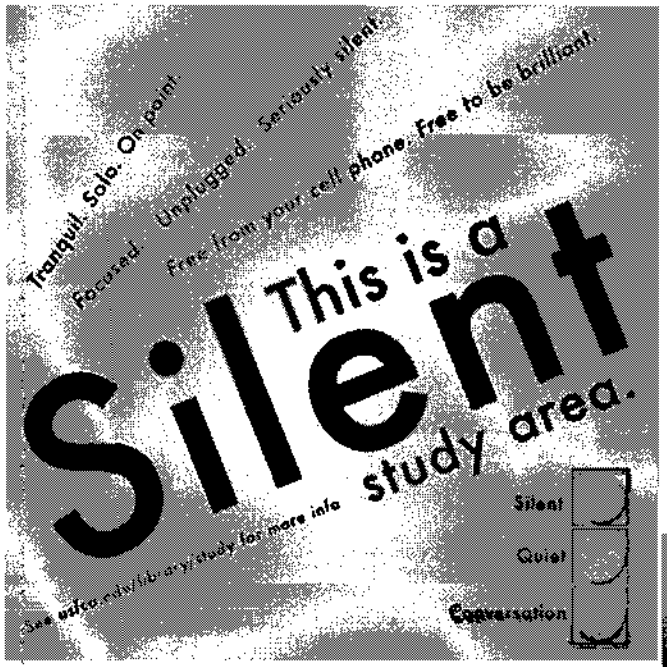
The Ivy Group, Ltd.

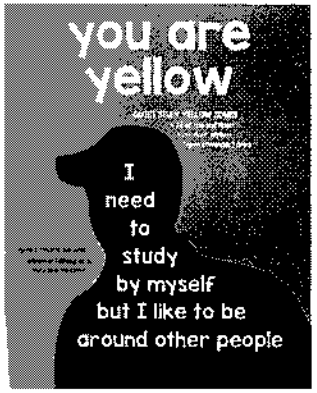
MICRO-SEGMENTATION

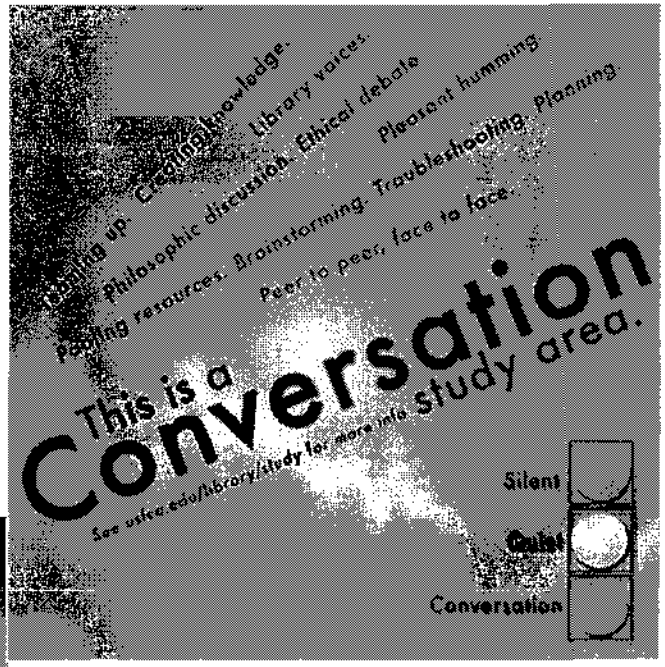
VIGILANTE CONSUMERISM

FLEXIBLE SPACES

LIBRARY REZONING

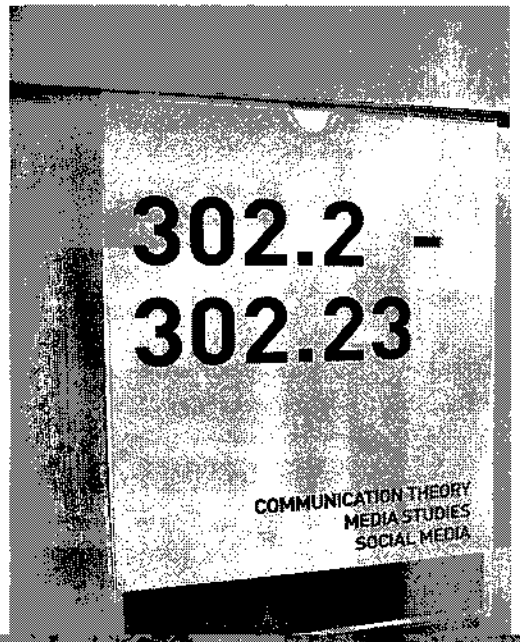


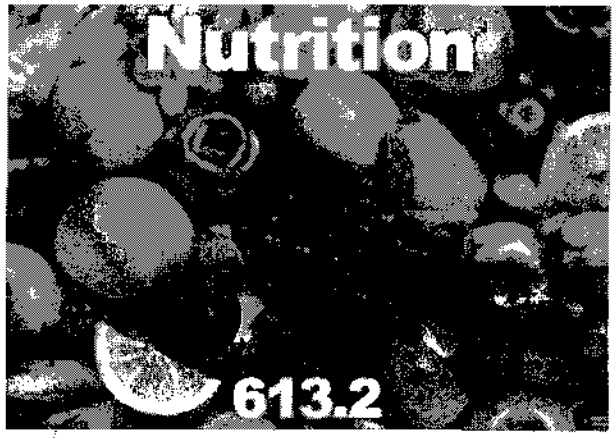


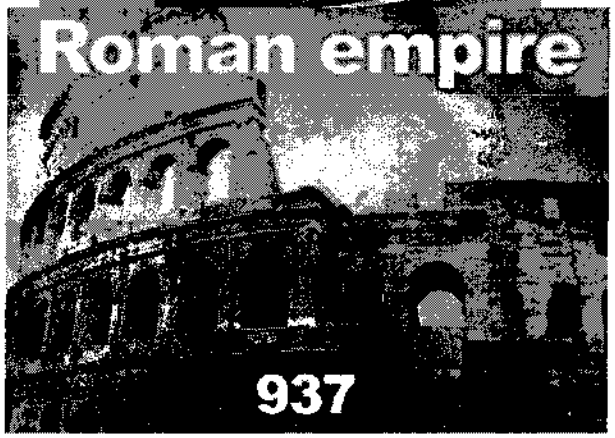


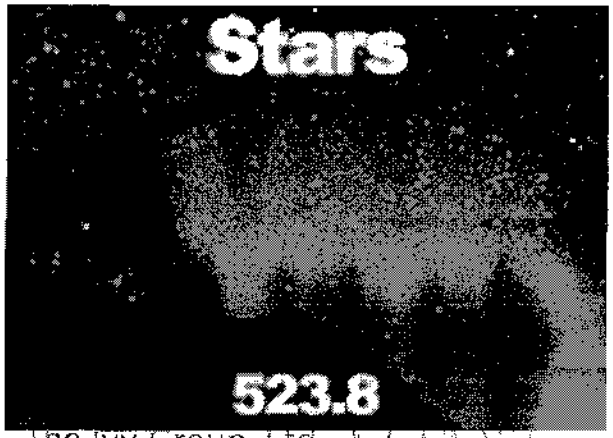
The Ivy Group, Ltd.

DEMYSTIFYING DEWEY









The Ivy Group, Ltd.

UPGRADING THE BRAND

anythink™

A REVOLUTION OF RANGEVIEW LIBRARIES

The Ivy Group, Ltd.

ABOUT THE IVY GROUP

Collaboration

Many ideas make light work.

Pam Fitzgerald
Managing Director

Expertise & Experience

Right brain meets left brain.

Nancy Davis, MLS

Partner

Insights

Listening and learning

Greg Heid, MLS

Consultant

Quality

Big picture.
Small detail.

Ellen Roberson

Project Manager

Collaboration & cooperation beat competition every time.

good teamwork matters

LiLi Libraries Linking Idaho www.lili.org UNLIMITED

WILLIAMSBURG REGIONAL LIBRARY

San Antonio Public LIBRARY mysapl.org

LibraryLeadershipOhio

LOUDOUN COUNTY PUBLIC LIBRARY Nurturing Minds

PUBLIC Frisco Library

MONMOUTH COUNTY LIBRARY

Bklyn Public Library

licking county library LCL

Serving Newark & Licking County Since 19

WORK PLAN

The Process

1. Situation Analysis
2. Benchmarking
3. Insider perspectives
4. Staff Survey
5. Executive Interviews
6. Site Visit
7. Market Segmentation Study
8. Focus Groups
9. Telephone survey
10. Online Survey
11. Planning summit
12. Staff Work Groups
13. Plan development
14. Plan launch and promotion

Benchmarking

Objective comparison of performance

	Total Collection Expenditures	Total Materials	Total Circulation	Circulation Per Capita	Cost Per Circulation
Cecil County Public Library	$613,839	389,527	1,158,294	11.3	$5.10
Corvallis-Benton County Public Library	$637,531	371,807	1,689,898	19.3	$3.42
Gloucester County Library	$363,627	336,092	510,192	5.0	$10.20
Johnson County Public Library	$769,792	331,670	916,333	8.8	$6.08
Peoria Public Library	$870,407	492,533	1,242,037	10.8	$5.49
Woodbridge Public Library	$658,358	546,432	571,069	5.7	$11.29
Mean	$652,259	411,344	1,014,637	10.1	$6.93
Median	$647,945	380,667	1,037,314	9.8	$5.79
Cecil County Rank	5	3	3	2	5

Benchmarking

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Median	$647,945	380,667	1,037,314	9.8	$5.79
Cecil County Rank	5	3	3	2	5

Board Interviews [Ivy]

Why?

- “insider” perspectives

What?

- issues and needs

Executive Interviews [SFPL]

Why?

- opens doors
- solicits perspectives
- cultivates and qualifies

What?

- issues and needs
- perceptions of Library performance
- insights into opportunities

STAFF SURVEY

Why?

- inclusivity
- transparency
- confidentiality

What?

- issues and needs

Market Segmentation

Why?

- characterizes and differentiates
- enables a branch to customize services and programs

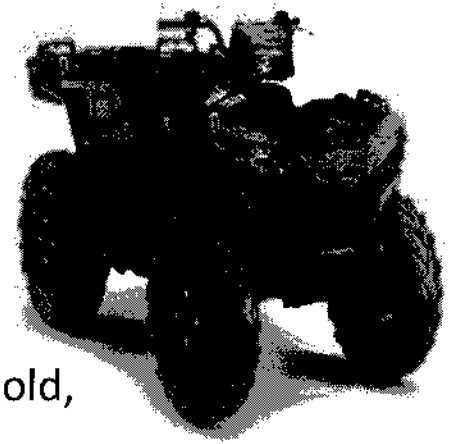
What?

- 11 “Lifestage groups”
- 66 segments

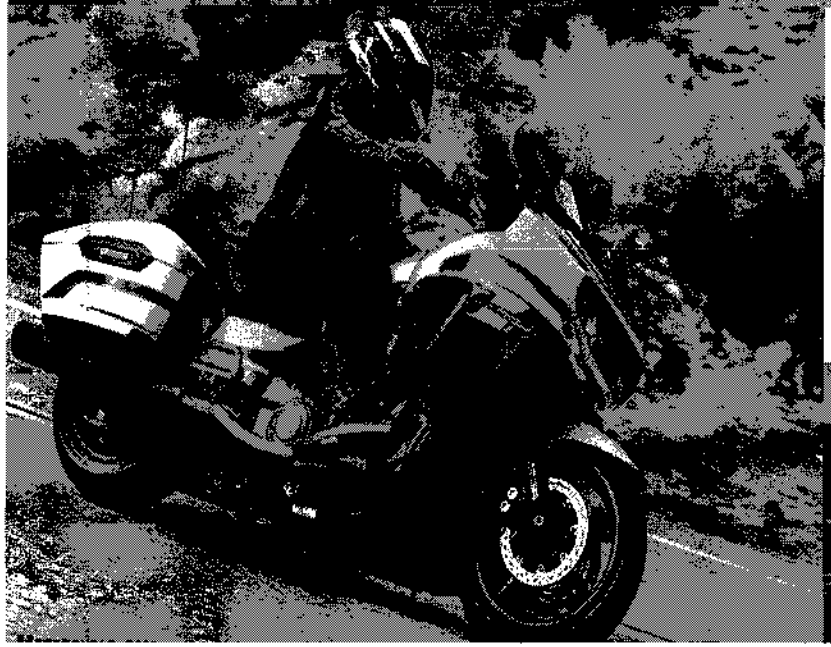
FAST-TRACK FAMILIES

- 35 – 54
- Caucasian; upscale; managerial or professional; college graduates; homeowners
- average household technology
- busy, active, centered on kids' schedules and interests
- frequent restaurant diners

SUBARU®



4 vehicles per household,
including a used van,
larger SUV



FAST-TRACK FAMILIES

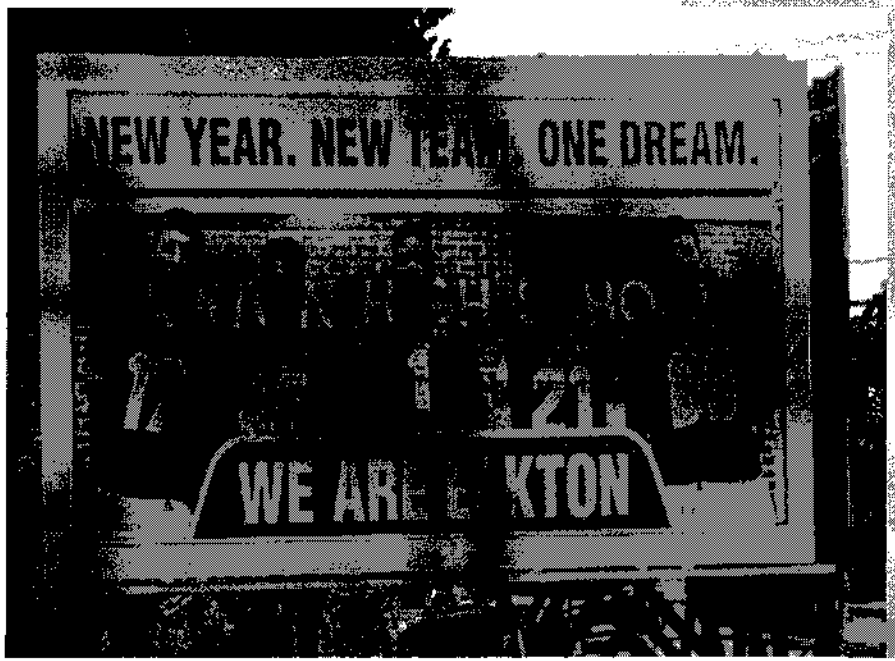
Savings Made Simple

GANDER MTN.

Domestic travel

Home improvement projects

Maternity-related medical



FAST-TRACK FAMILIES

Will read e-newspaper on smartphone or download a movie, but prefer

- TV: Motocross, high school sporting event, basketball, baseball, ESPNU
- FM Radio: basketball, NASCAR, football, rock music, country music, talk

How might a library branch respond?

- Collections?
- Programs?
- Services?
- Technology?
- Hours?
- Outreach?
- Messaging?

Community Input Sessions: Focus Groups

Why?

- solicits perspectives
- forestalls plan criticism and engages the community
- informs telephone script
- community relations

What?

- satisfaction with library performance
- unmet needs

Telephone Surveys

Why?

- confidential
- quantifiable and projectable
- qualified respondents
- inclusive of nonusers
- excellent community relations

What?

- TBD

Planning Summit [SFPL & Ivy]

- Lessons from the research
- Responsive strategies
- Prioritizing strategies according to feasibility and impact
- Reconsideration of mission, vision, values
- Charge to the work groups

After the Summit...[SFPL]

- Work group for each strategic areas of focus
- Details on phased implementation
- Baseline, progress, and success measures

THANK YOU!

LIBRARY STRATEGIES

Exhibit 3

Hello, Santa Fe Public Library.
Nice to meet you.

The Santa Fe Public Library plays a unique and critical role in developing the future of your community.

Library Strategies can help you plan your future.

LIBRARY STRATEGIES

We Strengthen Communities One Library at a Time.

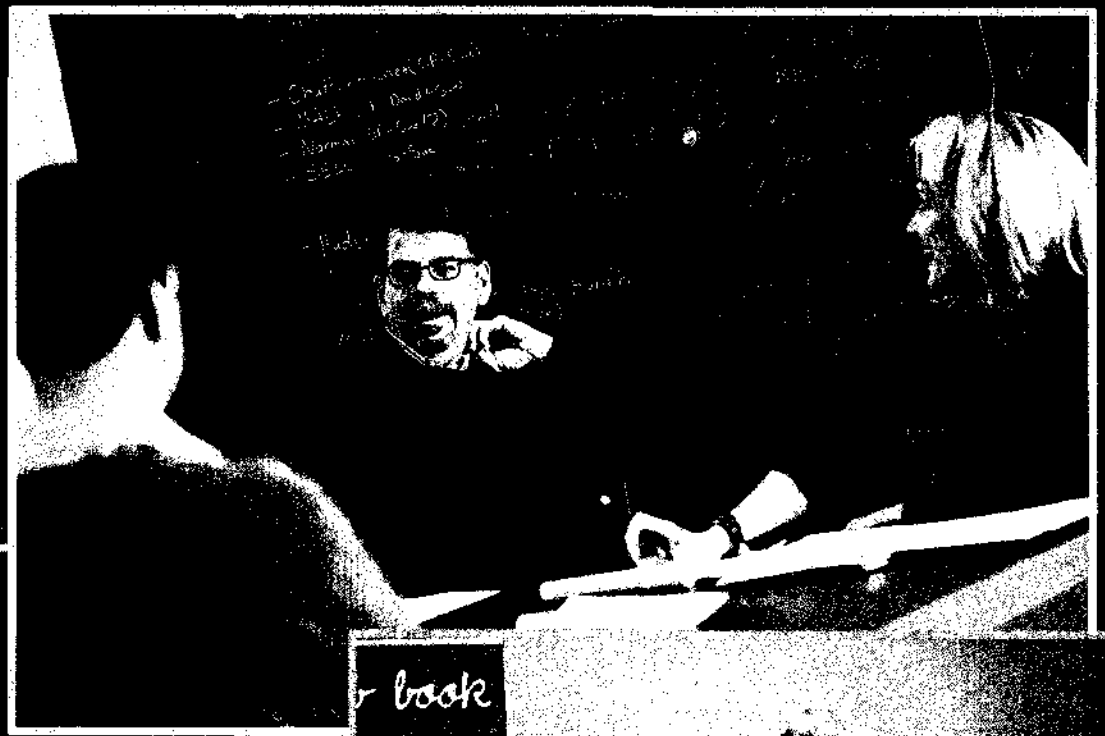
We are a nonprofit consulting firm, within the Friends of the Saint Paul Public Library, created to partner with library organizations to serve and strengthen their communities.

LIBRARY STRATEGIES

We GET libraries.....	We serve libraries *exclusively*
We share your mission.....	We're a library nonprofit
We engage your communities..	To use, support, advance the Library
We bring practical solutions.....	We've been doing this for decades
We are comprehensive.....	We understand library ecosystems
We are your partners.....	Our goal is to increase your ability to serve your community

Library Strategies Consulting Group

- 3 principal consultants
- 18+ associate consultants
- National & international
- Combined 100+ years experience
- Extensive "backroom"



LIBRARY STRATEGIES

- Strategic Planning
- Facilities, Staff & Technology Planning
- Feasibility Studies & Capital Campaigns
- Development and Fundraising Planning
- Board Training & Development
- Friends & Foundations
- Marketing & Advocacy

Your Library Strategies Team

Stu Wilson – Library Strategies Director

Over 30 years of experience working with libraries and cultural organizations. Former head of the Minneapolis library foundation. Project leader.

Toni Garvey – Lead Consultant

Former Director of the Phoenix Public Library. Has led numerous planning efforts – in addition to participating in more than a dozen library design projects. Expert for the service delivery, programming, and facilities portions of the project.

Your Library Strategies Team

Christopher Stewart – Lead Consultant

Formerly at Dominican University and the Illinois Institute of Technology. Experienced in operational, space and technology planning. Expert for the facilities, technology, and organizational aspects of the project.

David Katz – Project Coordinator/Research

Project and Business Manager with Library Strategies. Coordinates communications, research and project management for the process.

PLANNING HALLMARKS

- **BIG PICTURE:**
  What needs to change, be different?
- **COMMUNITY FOCUS:**
  Engage, customer needs/desires
- **ASSESS SERVICES/RESOURCES:**
  Practical, realistic, effective
- **COMPREHENSIVE:** Look at everything
- **EXPEDITIOUS:** Move to action

LIBRARY STRATEGIES

OUR APPROACH TO YOUR PLAN

- PHASE I: Preparation, Data Review and Benchmarking
- PHASE II: Stakeholder Input
- PHASE III: Community Engagement - Retreat
- PHASE IV: Assessment Report & Recommendations
- PHASE V: Strategic, Implementation, Evaluation Plans, with Dashboard

LIBRARY STRATEGIES

PHASE I: Preparation, Data Review and Benchmarking

- ✓ Planning Committee meeting
- ✓ Library tours
- ✓ Data collection & review
- ✓ Trend analysis and benchmarking

LIBRARY STRATEGIES

PHASE II: Stakeholder Input

- ✓ Online community survey
- ✓ Staff survey
- ✓ Board/Staff SWOT sessions
- ✓ Key stakeholder interviews
- ✓ Survey analysis
- ✓ Survey, SWOT, interview reports

LIBRARY STRATEGIES

PHASE III: Community Engagement

THE RRP Retreat Overview

- ✓ Invitation Process is Key
- ✓ 40-60 Participants – Broad Cross-Section of the Community
- ✓ Results: Vision, Goals, Strategies, Buy-In from the Community

LIBRARY STRATEGIES

PHASE III: Community Engagement

The RRP Retreat Structure

1. Present Information: Library, Findings, Future Trends
2. Big Group: Community Visioning and Goals
3. Small Groups: Strategies

LIBRARY STRATEGIES

PHASE IV: Detailed Assessment Report

Audit and Recommendations on Operations:

- ✓Facilities
- ✓Programming
- ✓Service Delivery
- ✓Technology
- ✓Partnerships
- ✓Governance
- ✓Funding and Fundraising
- ✓Organizational Structures

LIBRARY STRATEGIES

PHASE V: Strategic, Implementation, Evaluation Plans, and Dashboard

- ✓ Draft and Finalize Strategic Plan
- ✓ Dashboard Tool
- ✓ Staff Implementation Plan
- ✓ Continuous Improvement/ Evaluation Plan

PROJECTED TIMEFRAME

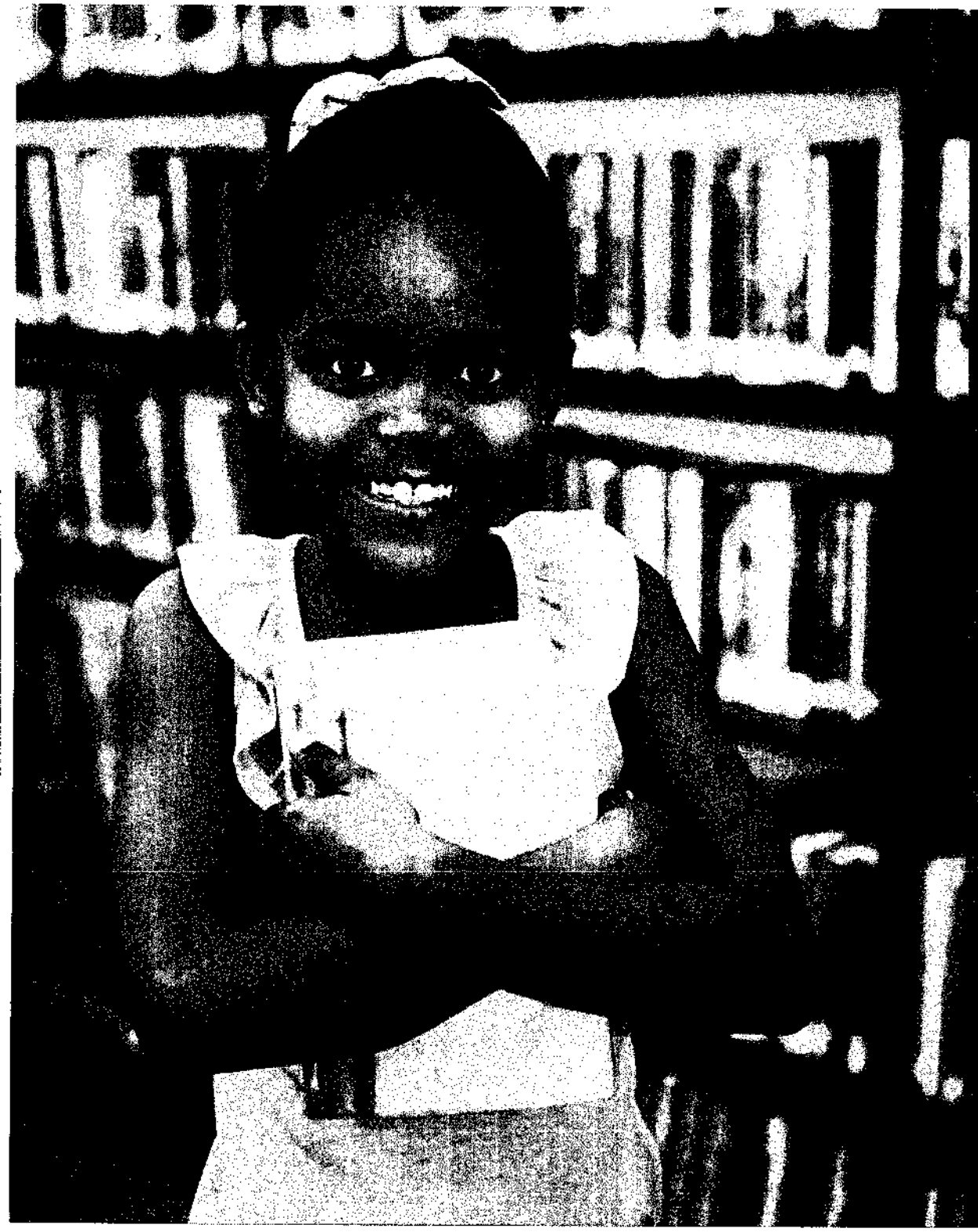
6 months

from initiation to completion

PROPOSED BUDGET

$50,750

plus expenses



LET'S WORK TOGETHER TO MAKE SANTA FE STRONGER.

THANK YOU!