

Date: December 18, 2017
To: Library Commission
From: Sean Reinhart, Director of Library and Community Services
Subject: 21st Century Library transition and operating plan

In preparation for the transition to the 21st Century Library facility in 2018, Library staff is developing a Transition and Operating Plan for the new facility. While the plan is not yet fully developed or complete, the plan's primary framework has been established and the major plan areas identified.

The purpose of the Transition and Operating Plan is to map out a detailed strategy and task inventory for transitioning library operations from the old library to the new library, and for operating the new facility.

Library staff seeks Commissioners' feedback and comments on the preliminary working draft plan. The details of the preliminary working draft plan are still in development and are subject to change. Commissioner's input about the preliminary working draft plan will be integrated into a Draft Plan for additional Library Commission review and recommendation at the January 22, 2018 Library Commission meeting. The Commission's recommended Final Plan will be presented to City Council for approval at the February 20, 2018 Council meeting.

A copy of the preliminary working draft plan is attached to this informational report for Commissioners' review and comment.

Attachment: Preliminary Working Draft Plan - 21st Century Transition and Operating Plan (8 pages)

PLAN SECTION	LEADS	NEXT TASK	TASK DATE	END GOAL	GOAL DATE
A. STAFFING	SR & LMT			FINAL PLAN	2/15/2018
<i>Team meetings (weekly)</i>	<i>SR</i>	<i>Convene staff team meeting</i>	<i>weekly</i>	<i>Finalize section plan</i>	<i>2/8/2018</i>
1 Service desk scheduling @ 21CL	VA, CH	Create draft desk schedule	12/18/2017	Finalize staff desk schedule	3/14/2018
2 Main-Weekes staff rotations	VA, MO	Create draft M-W rotation	12/18/2017	Finalize staff rotation	3/14/2018
3 Staff training @ 21CL	VA, CH	Create draft staff training plan	1/30/2018	Finalize staff training plan	3/14/2018
4 Analysis of needed staff, operating hours	SR, CT	Complete staffing analysis	1/8/2018	Present options to Council	2/15/2018
B. COLLECTIONS - BOOKS & MEDIA	CH			FINAL PLAN	2/15/2018
<i>Team meetings (2/mo.)</i>	<i>CH</i>	<i>Convene staff team meeting</i>	<i>2/mo.</i>	<i>Finalize section plan</i>	<i>2/8/2018</i>
1 Select/acquire new books and media	CH	Ongoing	1/30/2018	Complete acquisition	1/30/2018
2 Digital resources & collections	CH	Complete assessment of resources, needs	1/30/2018	Update digital resources	3/15/2018
3 Processing new items (Main & Weekes)	VA	Coordinate ODC processing w/ vendors	1/30/2018	Process ODC	3/15/2018
4 Collection development policy update	CH	Draft policy update	2/8/2018	Present policy to Library Cmsn	3/15/2018
5 <i>Collections move / new deliveries</i>	<i>see Move-in</i>	-	-	-	-
6 <i>Friends of Library stock</i>	<i>see Move-in</i>	-	-	-	-
C. TECHNOLOGY EQUIPMENT & SUPPORT	SR			FINAL PLAN	2/15/2018
<i>Team meetings</i>	<i>SR</i>	<i>Convene 21CL user tech team meeting</i>	<i>12/19/2017</i>	<i>Finalize section plan</i>	<i>2/8/2018</i>
1 Network	CM	Coordinate w/ IT to finalize equipment list	12/19/2017	Coordinate delivery/installation	3/15/2018
2 Makerspace - equipment / software	CH, LV	Coordinate w/ IT to finalize equipment list	1/8/2018	Coordinate delivery/installation	3/15/2018
3 Digital media lab - equipment/ software	LV, ST	Coordinate w/ IT to finalize equipment list	1/8/2018	Coordinate delivery/installation	3/15/2018
4 Tech classroom - equipment / software	LV, ST	Coordinate w/ IT to finalize equipment list	1/8/2018	Coordinate delivery/installation	3/15/2018
5 AMH, Self-checks	VA	Coordinate early delivery of sorter	12/27/2017	Coordinate delivery/installation	3/15/2018
6 Integrated Library System (Sierra ILS)	CH	Coordinate w/ IT to implement new modules	1/8/2018	Coordinate installation	3/15/2018
7 Public internet PCs	VA, CH	Coordinate w/ IT to finalize equipment list	1/8/2018	Coordinate delivery/installation	3/15/2018
8 OPACs	VA, CH	Coordinate w/ IT to finalize equipment list	1/8/2018	Coordinate delivery/installation	3/15/2018

PLAN SECTION	LEADS	NEXT TASK	TASK DATE	END GOAL	GOAL DATE
9 Staff PCs	VA, CH, LV	Coordinate w/ IT to finalize equipment list	1/8/2018	Coordinate move/installation	3/15/2018
10 FOHL Bookstore POS system	SR,	Coordinate w/FOHL to select equipment	1/17/2018	Coordinate delivery/installation	3/15/2018
11 Website update	CH,	Inventory content updates needed	2/8/2018	Execute changes to website	3/15/2018
12 Wifi, internet access - Public	See Policies	-	-	-	-
13 Electronic resources - Public (databases, etc)	see Collections	-	-	-	-
14 Copy/ print station - Public	See Operations	-	-	-	-

D. SPECIAL FACILITIES & PROGRAMS	LV & CH			FINAL PLAN	2/15/2018
<i>Team meetings(2/ mo.)</i>	CH & LV	Convene staff team meeting	2/mo.	Finalize section plan	2/8/2018
1 Makerspace	CH, LV	Coord. w/Chabot/CSUEB, HAS, ROP	1/8/2018	Finalize makerspace plan	2/8/2018
2 Digital media creation lab	LV, ST	Coord. w/Chabot/CSUEB, HAS, ROP	1/8/2018	Finalize DMCLab plan	2/8/2018
3 Technology training classroom	LV, ST	Coord. w/Chabot/CSUEB, HAS, ROP	1/8/2018	Finalize Tech classroom plan	2/8/2018
4 Bookstore - partner agreement	SR	Develop agreement w/ FOHL	1/15/2018	Present agreement to Council	1/30/2018
5 Café - operator agreement	SR	Issue operator RFQ	12/11/2018	Present agreement to Council	1/16/2018
6 Art galleries - partner agreement	SR, ST	Issue partner RFQ	12/21/2018	Present agreement to Council	1/16/2018
7 Local history center - partner agreement	SR, ST	Draft agreement w/ HAHS	1/15/2018	Present agreement to Council	2/15/2018
8 Forever card	SR, VA	Draft implementation plan	2/15/2018	Implement Forever card rollout	4/15/2018

E. MOVE-IN / LOGISTICS	VA			FINAL PLAN	2/15/2018
<i>Team meetings (2/mo.)</i>	VA	Convene staff team meeting	2/mo.	Finalize section plan	2/8/2018
1 Purge / recycle / inventory old main library	OR, LW	Coordinate recycler, shredder, files retention	12/7/2017	Complete inventory plan	2/8/2018
2 Collections: Move old to 21CL	CH, VA	Execute moving contract w/ Bibliotheca	11/30/2017	Execute move/ shelving	3/15/2018
3 Collections: New deliveries	CH, VA	Create shelving map and plan	1/15/2018	Execute delivery/ shelving	3/15/2018
4 Furnishings: Move old to 21CL	VA, CH	Create inventory of furnishings to be moved	12/7/2017	Execute move	3/15/2018
5 Furnishings: New installation	CT, SR	Present procurement to Council	12/5/2017	Execute delivery/ installation	3/15/2018
6 Furnishings: Move old to Weekes for reuse	MO, VA	Create inventory of furnishings to be moved	12/7/2017	Execute move	3/15/2018

PLAN SECTION	LEADS	NEXT TASK	TASK DATE	END GOAL	GOAL DATE
7 AMH, self-check system: New installation	VA	Execute contract w/ Bibliotheca	11/30/2017	Execute delivery/ installation	3/15/2018
8 Self-checks: Move old to 21CL	VA,	Execute contract w/ Bibliotheca	11/30/2017	Execute move	3/15/2018
9 Computers: Move old to 21CL	VA,	Coord. draft moving plan w/ IT	1/15/2017	Execute move	3/15/2018
10 Computers: New installation	VA,	Coord. draft installation plan w/ IT	1/15/2017	Execute delivery/ installation	3/15/2018
11 Staff belongings: Move to 21CL	VA, CH	Draft inventory of items to be moved	1/15/2018	Execute move	3/15/2018
12 Educ. Svcs: Move from City Hall to 21CL	LV, VA	Create inventory of items to be moved	12/7/2017	Execute move	3/15/2018
13 Lost/found/reclaimed items during move	MO	ID location, system for handling items	2/15/2018		
14 Supplies: Move old to 21CL	VA, CH	Create inventory of supplies to be moved	12/7/2017	Execute move	3/15/2018
15 Supplies: New purchases	OR	Create list of new supplies needed	1/15/2018	Execute purchase / delivery	3/15/2018
16 Program supplies	CH, VA	Create inventory of supplies to be moved	12/7/2017	Execute move	3/15/2018
17 Public Art: Permanent collection	SR	Coordinate w/ Beth Jones, PW, Noll+Tam	2/15/2018	Coordinate installations	3/15/2018
18 Library services during shutdown	VA	Finalize services to be provided	2/15/2018	Initiate temporary services	3/15/2018
19 Friends donations (stop during shutdown)	SR	ID alternate donation site	1/15/2018	Halt donations	1/30/2018
20 Surplus /auction usable items	VA	Draft inventory of items to surplus/auction	1/15/2018	Coordinate surplus/auction	3/15/2018
21 Earthquake supplies – keep/dump/buy?	VA	Draft inventory of items to keep/discard	1/15/2018	Coordinate move/delivery (if any)	3/15/2018

F. OPENING DAY CEREMONIES	SR & LMT			FINAL PLAN	2/15/2018
<i>Team meetings (2/mo.)</i>	SR	<i>Convene staff team meeting</i>	<i>1/15/2018</i>	<i>Finalize section plan</i>	<i>2/8/2018</i>
1 Opening Day festival	LMT	Present draft plan to Lib. Comm.	2/26/2018	Present plan to Council	3/15/2018
2 Sneak preview events (Class visits, makerspace, teens, donors, etc.)	LMT	Present draft plan to Lib. Comm.	2/26/2018	Present plan to Council	3/15/2018
3 Library Ambassadors (volunteer docents)	LMT	Present draft plan to Lib. Comm.	2/26/2018	Present plan to Council	3/15/2018
4 Time capsule	LMT	Present draft plan to Lib. Comm.	2/26/2018	Present plan to Council	3/15/2018
5 FOHL donor recognition event	SR	Present draft plan to Lib. Comm.	2/26/2018	Coordinate events w/FOHL	4/15/2018
6 Poetry Contest	LV, SR	Present draft plan to Lib. Comm.	2/26/2018	Coordinate events w/FOHL	4/15/2018
7 Community “book chain” moving event	LMT	Present draft plan to Lib. Comm.	2/26/2018	Present plan to Council	3/15/2018
8 Publicity & media	ST	Present draft plan to Lib. Comm.	2/26/2018	Present plan to Council	3/15/2018

PLAN SECTION	LEADS	NEXT TASK	TASK DATE	END GOAL	GOAL DATE
9 Youth Hall of Fame awardees	LV	Present draft plan to Lib. Comm.	2/26/2018	Present plan to Council	3/15/2018
G. OPERATIONS - ONGOING		VA & CH		FINAL PLAN	2/15/2018
<i>Team meetings</i>	<i>VA & CH</i>	<i>Convene staff team meeting</i>	<i>12/4/2017</i>	<i>Finalize section plan</i>	<i>2/8/2018</i>
1 Scheduling / desk coverage	VA & CH	Create draft desk schedule	12/4/2017	Finalize staff desk schedule	3/14/2018
2 Copy/print stations	VA	Research copy/print options (value on library card, integration w/ Sierra)	11/30/2017	Coordinate delivery/installation	3/15/2018
3 Deliveries / processing	VA	Draft procedures plan	1/15/2018	Finalize procedures plan	2/8/2018
4 Opening/ closing procedures	VA & CH	Draft procedures plan	1/15/2018	Finalize procedures plan	2/8/2018
6 Staff lounge/ kitchenette/ appliances	OR	Draft procedures plan	1/15/2018	Finalize procedures plan	2/8/2018
7 Main - Weekes staff rotation	VA, MO	Draft Main-Weekes rotation	12/18/2017	Finalize staff rotation	3/14/2018
8 Library cards (standard, FOHL, forever)	VA, SR	Draft procedures plan	1/15/2018	Finalize procedures plan	2/8/2018
9 Janitorial	VA	Draft janitorial plan	1/15/2018	Implement janitorial service changes	3/14/2018
10 Public access computers -2nd Fl	VA & CH	Draft procedures plan	1/15/2018	Finalize procedures plan	2/8/2018
10 Public access computers -1st Fl	VA & CH	Draft procedures plan	1/15/2018	Finalize procedures plan	2/8/2018
11 Safety & Security	<i>see Safety</i>	-	-	-	-
12 Sustainability	<i>see Green</i>	-	-	-	-
13 Makerspace, digital media lab, tech classroom	<i>see Spc. Facilities</i>	-	-	-	-
14 FOHL office, bookstore	<i>see Spc. Facilities</i>	-	-	-	-
15 Café operations	<i>see Spc. Facilities</i>	-	-	-	-
16 Meeting Rooms	<i>see Meeting Rooms</i>	-	-	-	-
17 Staff Procedure manual	<i>see Policies</i>	-	-	-	-
18 Training	<i>see Policies</i>	-	-	-	-
H. LIBRARY PROGRAMS		CH & LV		FINAL PLAN	2/15/2018
<i>Team meetings (2/ mo.)</i>	<i>CH</i>	<i>Convene staff team meeting</i>	<i>2/mo.</i>	<i>Finalize section plan</i>	<i>2/8/2018</i>
1 Current programs	CH, LV	Draft program plan	2/15/2018	Finalize program plan	3/15/2018

PLAN SECTION	LEADS	NEXT TASK	TASK DATE	END GOAL	GOAL DATE
2 New programs	CH, LV	Draft program plan	2/15/2018	Finalize program plan	3/15/2018
3 Library Ambassador Program	ST	Draft program plan	2/15/2018	Finalize program plan	3/15/2018
4 Literacy / Homework	LV	Launch of services plan	2/15/2018	Finalize program plan	3/15/2018
5 Seed Library	ST	Replenish stock	2/15/2018	Finalize program plan	3/15/2018
6 <i>Special Facilities & Programs</i>	<i>see Spc. Facilities</i>	-	-	-	-

I. MEETING ROOMS		ST & MO		FINAL PLAN	2/15/2018
	<i>Team meetings</i>	<i>ST & MO</i>	<i>Convene staff team meeting</i>	<i>1/15/2018</i>	<i>Finalize section plan</i>
1	Software: Room scheduling, reservations	ST, MO	Research software options, report out	12/18/2017	Implement reservation software
2	Community learning center	ST,	Develop list of partner programs	12/4/2017	Finalize Year 1 CLC partners
3	Study booths	LV	Draft reservation policy for for tutor/learner pairs.	1/15/2018	Finalize study booth procedures
4	Plaza	SR	Convene plaza program staff team	2/8/2018	Finalize Plaza programming plan
5	Meeting Room Policy and Fees	SR	LC approve new policy and fees	11/13/2017	Add fees to Master Fee Schedule
6	Special events / after-hours access	VA, SR	Draft access plan	3/15/2018	Finalize meeting room procedures

J. POLICIES, PROCEDURES, TRAINING		SR & LMT		FINAL PLAN	2/15/2018
	<i>Team meetings (weekly @ LMT)</i>	<i>SR & LMT</i>		<i>Finalize section plan</i>	<i>2/8/2018</i>
1	Policy: Accessibility of library resources, facilities, programs	LMT	Develop draft policy	1/15/2018	Present policy to Library Cmsn
2	Policy: Diversity, inclusivity, equity	LMT	Develop draft policy	1/15/2018	Present policy to Library Cmsn
3	Policy: Computer use	LMT	Revise/ update policy for 21CL	1/15/2018	Present policy to Library Cmsn
4	Policy: Public flyers	CH	Revise/ update policy for 21CL		Present policy to Library Cmsn
5	Training: Staff safety & security	LMT	Develop draft training program	2/15/2018	Finalize safety training plan
6	Procedure: Staff procedures manual	LMT	Revise/ update procedures manual	3/15/2018	Finalize procedures manual
7	<i>Policy: Customer Conduct</i>	<i>see Safety & Sec.</i>	-	-	-
8	<i>Policy: Meeting Room Fees</i>	<i>see Meeting Rooms</i>	-	-	-
9	<i>Policy: Collection Development</i>	<i>see Collections</i>	-	-	-

PLAN SECTION	LEADS	NEXT TASK	TASK DATE	END GOAL	GOAL DATE
10 Policy: Energy and Environmental	see Green	-	-	-	-
K. SAFETY & SECURITY	MO & CH			FINAL PLAN	2/15/2018
Team meetings	MO & CH	Convene staff team meeting	1/15/2018	Finalize section plan	2/8/2018
1 Disaster prep/response plan	MO & CH	Develop draft plan	3/15/2018	Finalize disaster prep/response plan	4/15/2018
2 Emergency equipment (Defibs, first aid, etc.)	VA	Develop draft plan	3/15/2018	Implement/install	4/15/2018
3 Security cam footage	SR	Develop draft policy/proc.	3/15/2018	Finalize security cam footage plan	4/15/2018
4 Entry/ exit/ parking safety	MO & CH	Revise/ update procedures for 21CL	3/15/2018	Finalize entry/exit/ parking safety plan	4/15/2018
5 Customer code of conduct	MO & CH	Revise/ update policy	1/15/2018	Present policy to Library Cmsn	2/15/2018
6 Staff Training	see Policies	-	-	-	-
7 Emergency procedures	see Policies	-	-	-	-
L. GREEN & SUSTAINABILITY	ST & VA			FINAL PLAN	2/15/2018
Team meetings	ST	Convene staff team meeting	1/15/2018	Finalize section plan	2/8/2018

PLAN SECTION	LEADS	NEXT TASK	TASK DATE	END GOAL	GOAL DATE
1 Building's green features (maintenance)	VA	Develop draft plan	3/15/2018	Finalize green maintenance plan	4/15/2018
2 Public education	ST	Develop draft plan	3/15/2018	Finalize public educ. plan	4/15/2018
3 Waste / recycling	ST	Develop draft procedures	3/15/2018	Finalize waste/recycling plan	4/15/2018
4 Certifications (LEED / Zero Net Energy)	SR	Develop draft certification plan	3/15/2018	Finalize certification plan	4/15/2018
5 City requirements for waste/recycle	VA	Develop draft compliance policy/plan	3/15/2018	Finalize waste/recycling plan	4/15/2018
6 Policy: Energy and Environmental	ST, SR	Revise/ update policy for 21CL	2/15/2018	Present policy to Library Cmsn	3/19/2018
7 Staff training	see Training	-	-	-	-

M. PUBLICITY, AWARDS, GRANTS	ST & SR			FINAL PLAN	2/15/2018
Team meetings	ST	Convene staff team meeting	1/15/2018	Finalize section plan	2/8/2018
1 City-wide PR	ST, SR	Coord w/PIO, CMO	2/15/2018	Finalize PR plan	2/15/2018
2 Coordinate w/FOHL	SR, LV	MN: Joint HPL-FOHL newsletter	1/8/2018	Issue first joint newsletter	2/15/2018
3 Grants	ST	Ongoing	2/15/2018	Finalize grants strategy	3/15/2018
4 Awards	SR	LJ Architecture, Helen Putnam, etc	2/15/2018	Finalize awards strategy	3/15/2018
5 Certifications	SR	LEED, Zero Net, etc	2/15/2018	Finalize certification strategy	3/15/2018
6 Presentations	LMT	CLA, ALA, League of Cities, MMANC, ELGL	2/15/2018	Finalize presentations plan	3/15/2018

N. BUDGET & FINANCE	SR & CT			FINAL PLAN	2/15/2018
Team meetings (weekly @ LMT)	SR & CT			Finalize section plan	2/8/2018
1 Construction budget	LMT	Ongoing	2/8/2018	Report out to Council	5/30/2018
2 Operating budget	LMT	Complete FY18 midyear budget update	2/8/2018	Present FY19 budget to Council	5/30/2018
3 Collections budget	LMT	Ongoing	2/8/2018	Present FY19 budget to Council	5/30/2018
4 Forever card - revenues	LMT	Draft implementation plan	3/15/2018	Implement Forever card	4/15/2018
5 Grants / donations	LMT	Ongoing	3/15/2018	Finalize fund dev. strategic plan	4/15/2018
6 FOHL	LMT	Finalize book store merchandising plan w/FOHL	2/15/2018	Open bookstore w/FOHL	