

HHS COMMITTEE #2
November 29, 2012
Briefing

MEMORANDUM

November 28, 2012

TO: Health and Human Services Committee

FROM: Vivian Yao, Legislative Analyst 

SUBJECT: **Briefing -- Montgomery County Public Libraries Strategic Plan FY13-FY16**

The Committee will receive a briefing on the Montgomery County Public Libraries (MCPL) Strategic Plan FY13-FY16. Parker Hamilton, Director of MCPL, will be presenting to the Committee. The presentation prepared by the Department is attached at ©1-19.

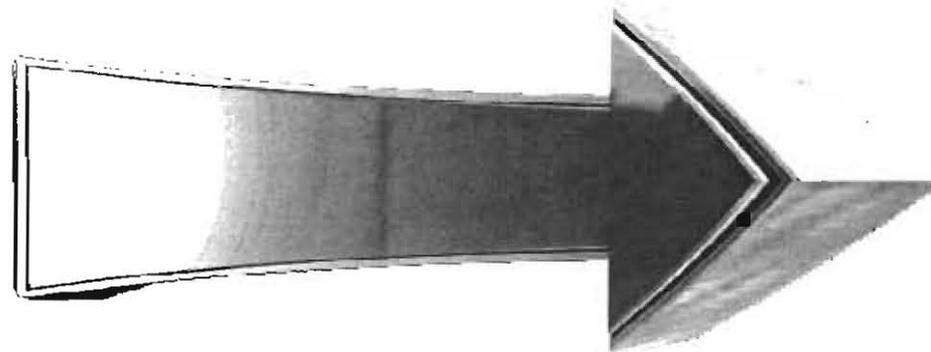
During review of the FY13 Operating Budget for the Public Libraries, Councilmembers requested a discussion of the Department's finalized technology and facility plans and analysis on trends in library use. The recently approved strategic plan includes the following components: Collection Policy (©20-31); Facilities Plan (©32-46); Technology Plan through Projects (©47-62) and Marketing Plan (©63-68). These plans were developed to complement each other. The presentation explains that these plans, taken together, are intended to move the library system into the 21st Century.

The Committee may be interested in discussing the following questions with Director Hamilton:

- What are the Department highest implementation priorities for projects and strategies identified in the four plans?
- How will the recommendations for facilities impact or compete with the existing projects in the FY13-18 Capital Improvement Program?
- What are the resource implications of the Collection, Facilities and Marketing Plans? (See ©52-62 for staffing and cost estimates for individual projects identified in the Technology Plan.) What does the Department anticipate will be needed in terms of capital, operating or non-public funding to carry it vision forward? What are the staffing implications from the proposed strategies and projects?
- To what extent will the Department pursue opportunities for private funding to support priorities highlighted in these plans? Which priorities may be better candidates for private support?

MONTGOMERY COUNTY PUBLIC LIBRARIES

Strategically Moving Forward To . . .

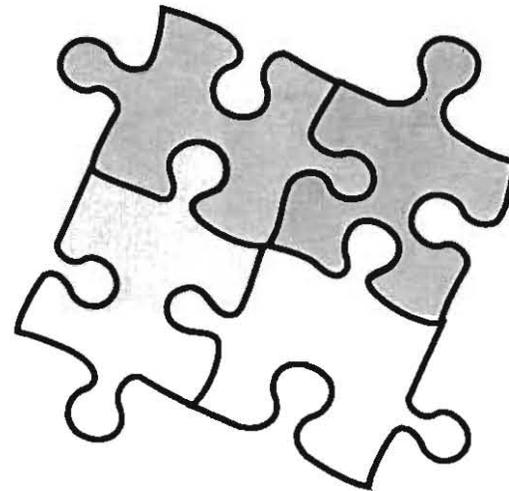


Strategic Plan FY13 – FY16

- ✓ Strengthen our Communities' Passion for Reading, Viewing and Listening
- ✓ Provide Learning Readiness through Early Literacy Programs
- ✓ Help Learners Succeed
- ✓ Bring Technology's Benefits to Everyone
- ✓ Empower Our Communities by Creating Awareness of Library Resources
- ✓ Build on Success
- ✓ Foster an Organizational Culture of Innovation



Strategic Plan FY13 – FY16



The Collection Policy, Facilities Plan, Technology Plan and Marketing Plan were developed to complement each other and are subsets of the Strategic Plan.



Collection Policy

FY13- FY16



Collection Policy Objectives



The Collection Policy presents the strategies to:

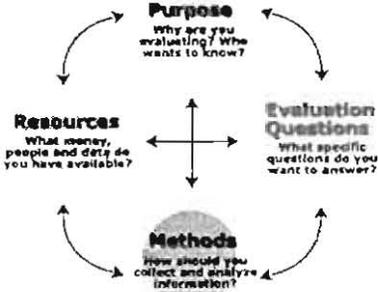
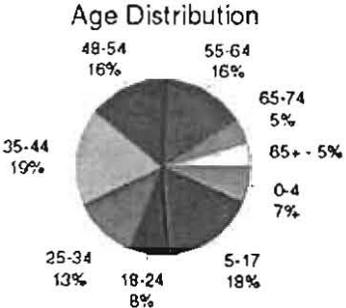
- Develop,
- Expand,
- Provide for Diversity, and
- Build a 21st Century library collections in order to meet the library needs and expectations of the Montgomery County residents and communities.

This policy provides the process to expand the Library's capacity to make more information and resources accessible to residents and to continue the Library's tradition of staying abreast of new and emerging resources and incorporate them into the collection as appropriate.

MC Montgomery County
PL PUBLIC LIBRARIES

Collection Policy FY13- FY16





Our commitment is to:

- ⤴ Anticipate future user and community needs and expectations
- ⤴ Collect input from the community as a high priority in the future development of the collection
- ⤴ Be responsive in the evaluation and re-evaluation of all library resources
- ⤴ Provide materials based on the County's demographics; and
- ⤴ Find new models of services that include technological advances

9.

Facilities Plan FY13-FY16

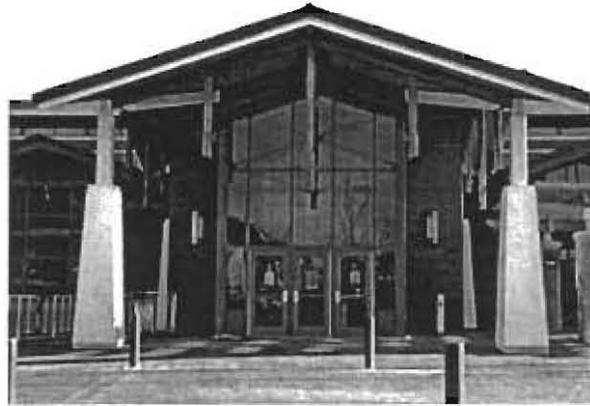
Strategic Objective

Build community through the Libraries' Facilities Plan.



Facilities Plan FY13-FY16

- ❖ Refresh
- ❖ Renovate
- ❖ Re-design
- ❖ Reach beyond our walls
- ❖ Realize synergies



To achieve its public service mission and maintain vital public library facilities over the next four years, five categories are recommended as the building framework to move the library system into the 21st Century using an established timeline and placed in the appropriate categories of:

- ▲ Refresh
- ▲ Renovate
- ▲ Re-design
- ▲ Reach beyond our walls
- ▲ Realize synergies

Facilities Plan Objectives



The Facilities Plan has 6 objectives:

- ▲ Implement a fiscally responsible approach for evaluating and recommending building plans for Facilities
- ▲ Increase the frequency of facility evaluations from five to three years as a cost savings approach to building maintenance
- ▲ Incorporate new and emerging technologies and tools into our building structures
- ▲ Present opportunities for change and flexibility to suit community needs and targeted audiences
- ▲ Provide a public input process to gather continuous participation from the communities
- ▲ Ensure ADA compliance

Technology Plan through Projects FY13-FY16

Strategic Objective

Strengthen library services to our customers and staff through the Libraries' Technology Plan.



Technology Plan through Projects FY13-FY16

Help people find information and other materials valuable to their lives.



MCPL's mission remains the same – to help people find information and other materials valuable to their lives.

What has changed and what will continue to change is that libraries keep pace with the way in which customers find and use the materials important to them.

Technology Plan through Projects FY13-FY16



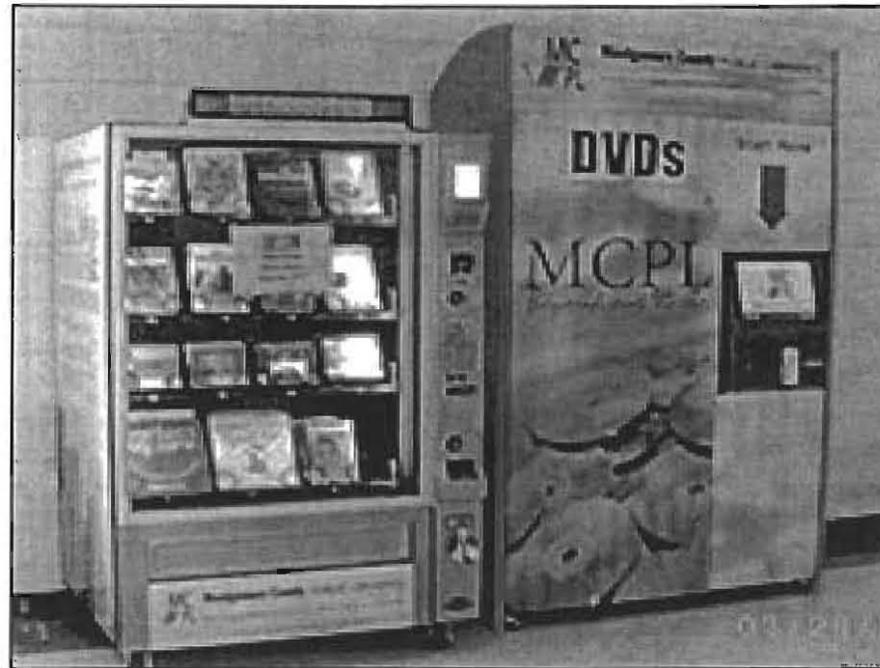
The Library system must operate both as a governmental department and a retail-style business. In addition to customer needs for technology in the provision of information services, library customers expect and demand that the Library system operate with the same level of efficiency, convenience, and effectiveness that they experience in the retail sector.

The retail sector offers:

- ▲ Modern payment technologies
- ▲ Self-service technologies
- ▲ Up-to-date web page technologies
- ▲ Efficient information searching technology
- ▲ Convenient account management technology

12 The current library system technology infrastructure in this regard is very basic. This plan will move MCPL in the right direction.

Technology Plan Projects



The FY13 – FY16 Technology Plan through Projects presents 9 projects designed to meet the demands of today while building for the technological demands of the future.

1. Enhanced Catalog Application Project (eCAP) - Customer satisfaction surveys and staff input document an overall dissatisfaction with the current catalog interface. The goal of this project is to enhance the customer's search capabilities and catalog functionality to improve the customer's ability to locate materials of interest to them.
2. Integrated Library System Evaluation Project (ISLEP) - MCPL's current ILS is 13 years old. This project will evaluate other ILS products available and determine if others will better meet the needs of County residents.
3. Kiosk Library Projects: Beyond Library Walls (KLip) - A kiosk is currently used in Olney while the library is under renovation. This project seeks to find additional locations in which this delivery system would be beneficial to our customers.

Technology Plan Projects

4. Radio Frequency Identification Project - RFID is a monitoring system for better inventory control of library materials; and a more efficient method for staff and our customers to check-in and out materials.
5. Restoring and Enhancing Vital Information Technology Assets in Libraries (REVITALize) - MCPL must ensure the “place” customers choose to read, meet and learn is equipped with the tools and technologies that are important to them. The current library infrastructure, which serves millions of customers each year, and thousands per day has aged. This project seeks to update all of the library’s current infrastructure.
6. Revitalize Obsolete Customer Information Technology Tools (ROCKit) - The software currently available to our customers on our Public computers is several generations behind what is currently available to businesses and the public at large. The increased demand from customers to update resumes, learn new job skills, apply for jobs and complete school assignments requires new technology.
7. Smart Room Technology (SMaRT) - MCPL needs technology to support the communities endeavors of entrepreneurship, becoming a New American or to solve a school assignment. The libraries are not only a destination for books, but a meeting place to create, share and learn.
8. Web Enhancement Project (WEP) - In addition to the Libraries’ participation in the County’s web re-fresh, MCPL’s website must serve the very diverse County audience, provide excellent site navigation , well-designed categories of information and be compliant with the American with Disabilities Act (ADA).
9. Digital Media Lab (DML) - The American worker of the future must be technically literate and able to create content effectively with modern media technology. Library space is an increasingly important gathering place where people meet and collaborate. Media labs are relevant for all ages.

These projects were developed based on feedback from the 2008 and 2011 Customer Satisfaction surveys along with staff input.

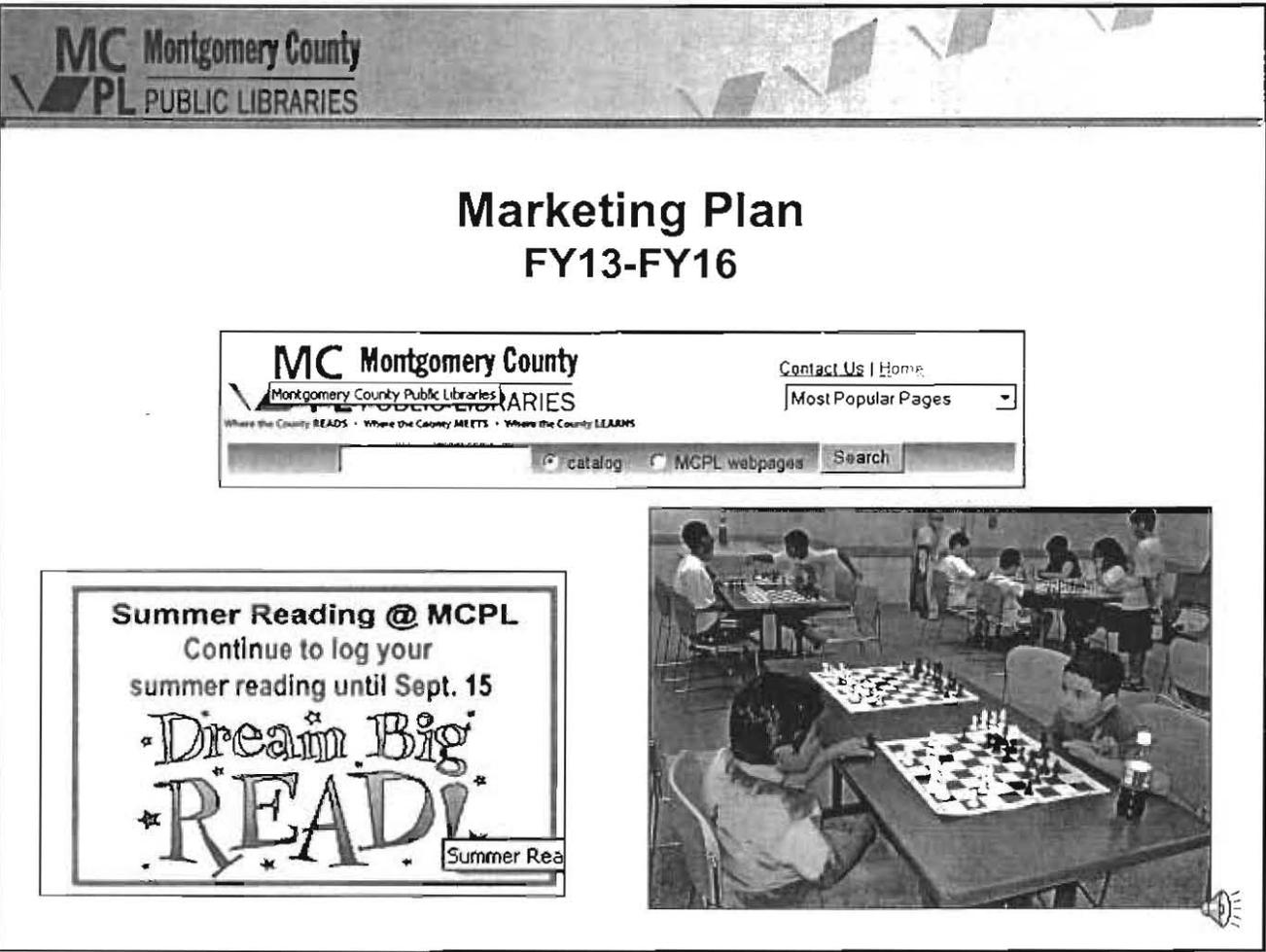
These nine projects can stand on their own as funding opportunities arise. But in total, these projects address the needs expressed by our customers and our staff as important in serving the community.

Marketing Plan FY13-FY16

Strategic Objective

*Communicate the roles of the Libraries to
the communities.*





The MCPL Marketing Plan is intended to strengthen the Library's image, increase library use by our residents, and drive traffic to our website.

The Plan will help MCPL develop and execute strategies that communicate our mission and demonstrate that vital role we play within the community.

Marketing Plan FY13-FY16

Results from the 2008 and 2011 Customer Satisfaction Surveys indicate that a percentage of our current library users are unaware of the programs, services and resources the library offers.

The FY13 – FY16 Marketing Plan presents a fresh opportunity to increase the Library's visibility and create interest in using the library. To accomplish this we grouped our marketing efforts into four categories.

- ▲ Refresh MCPL's website
- ▲ Revitalize MCPL's Outreach Program
- ▲ Renew MCPL's Collaboration opportunities
- ▲ Rededicate MCPL's marketing of library programs and services



Marketing Plan FY13-FY16

Gazette.Net
Maryland Community News Online

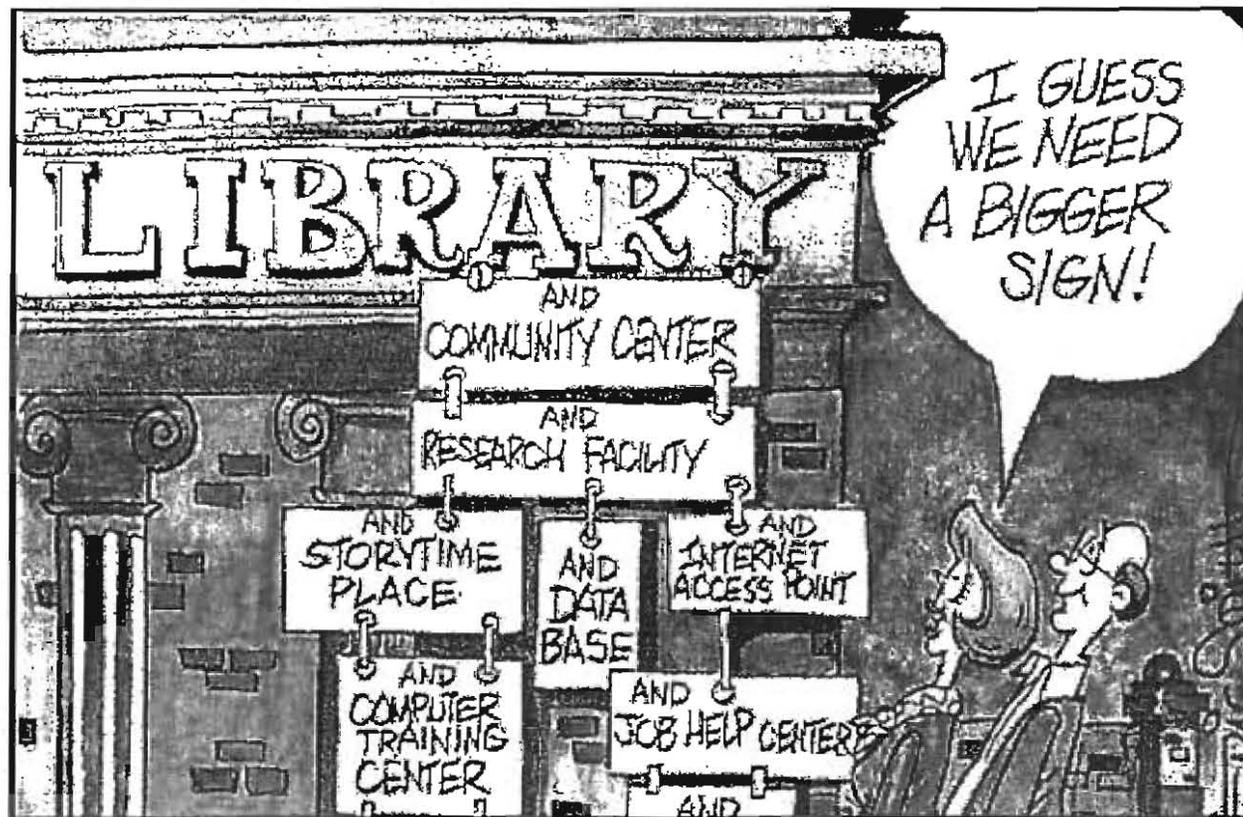


This Marketing Plan will:

- ▲ Ensure MCPL has a positive presence in the professional and news media community
- ▲ Promotes the revised Graphic Standards and uses Plain Language to communicate; and
- ▲ Provide staff with the knowledge and strategies to actively promote the library's services while delivering the same message with the same importance.

Strategically Moving Forward

The implementation of these plans will support the mission, vision, values and key results of Montgomery County Public Libraries.



Montgomery County Public Libraries

Where the County Reads, Where the County Meets, Where the County Learns

FY13 – FY16

Collection Policy

Executive Summary

The Montgomery County Public Libraries' Collections Policy presents the strategies to develop, expand, diversify, and build 21st Century library collections to meet the library needs and expectations of the Montgomery County residents/communities.

One of the strategic objectives of Montgomery County Public Libraries (MCPL) for FY13-FY16 is: "Make the Libraries' collections responsive to the diverse needs of the communities through the MCPL Collections Policy."

Collections Policy Objectives:

- To provide well-rounded and balanced collections which are comprised of new and popular materials; reference tools; materials that assist in life-long learning; and multi-lingual materials.
- To formulate cooperative agreements with organizations and groups to expand the Libraries' capacity to make more information and resources accessible to residents.
- To continue the Libraries' tradition of staying abreast of new and emerging resources; and, then to incorporate them into the collections as appropriate.
- To ensure intellectual freedom for all users.

The following chapters will present guidelines used by MCPL to fulfill these objectives.

- Materials Selection
- Cooperative Agreements
- Materials Deselection
- Intellectual Freedom

Introduction

The mission of Montgomery County Public Libraries is “to offer free and equal access to services and resources that connect the people of Montgomery County to ideas and information which sustain and enrich their lives.”

The Collection Policy reflects the mission of the Libraries. The Collection Policy serves as a guide to staff in the selection and retention of materials. It also provides the public information about the principles which support selection decisions. The Libraries’ users consist of many different types: early literacy age levels from birth to 5 years old; students from K-12; as well as higher education levels; ethnic communities; Seniors; the visually and hearing impaired; the homebound; local businesses; and prison inmates.

The Montgomery County population, which was 971,777 in 2012, will continue to increase an average of approximately 9,200 persons each year throughout the next eight years reaching over one million by 2014 and nearly 1,045,400 by 2018. There were 357,086 households in the County in 2012, and current projections estimate the number of households will increase to 364,900 in 2012. The County’s Senior population continues to grow with an estimated 119,769 persons 65 and older living here in 2010 and projected to increase to 154,061 by 2020. The County expects the public school student enrollment to increase by 7,062 between FY13 and FY18. The increase in diversity from 2000-2010 resulted in the County becoming a majority minority county for the first time.

This large diverse population possesses an unlimited range of interests. With a limited budget, Libraries must make decisions on how to best serve these myriad of interests. Therefore, Libraries has developed cooperative agreements or partnerships with other libraries to expand its capacity to make more information and materials available to residents which might not have otherwise been possible.

Montgomery County is fortunate to be surrounded by many high performance schools from elementary to universities; as well as numerous specialized libraries such as the National Library of Medicine, National Institute of Health, Library of Congress, National Agricultural Library, etc. With these easily accessible, MCPL does not purchase textbooks or in depth research materials.

In accordance with the goals and objectives of MCPL’s FY13 – FY16 Strategic Plan, Collection Management’s annual workplan will delineate a variety of activities which will increase the communication and collaboration with staff and customers in the pursuit of the development of “relevant and inspiring collections that meet the evolving needs and expectations of our communities.”

1. Materials Selection

The Director of Montgomery County Public Libraries (MCPL) is responsible for the collection development of the libraries. Authority for decisions on selection, maintenance, and withdrawal of materials is delegated by the Director to the manager and staff of the Collection Management division. The Collection Policy serves as a guide to staff in the selection and retention of materials. It also provides information to the public about the principles which support selection decisions.

Basic to the Policy are the American Library Association's Library Bill of Rights, Freedom to Read Statement and, the Freedom to View Statement. These statements pertain to all information formats, including print, video, audio, digital and electronic formats.

Libraries assure that the collection is open and accessible to all residents. Libraries is committed to a collection which presents a variety of points of view on all subjects. Libraries seeks to meet the community's needs, and recognizes that some materials may be controversial. It is the responsibility of each library user to choose materials which suit their individual tastes and needs. Individuals are free to reject materials for themselves that they do not approve; but they may not restrict the freedom of others to read, listen, or view materials for which they are interested. Responsibility for children's use of library materials rests solely with their parents or caregivers.

The primary objective of MCPL's materials selection is to provide well-rounded and balanced collections comprised of new and popular materials; reference tools; materials that assist in life-long learning; and multi-lingual materials. The collections are meant to anticipate, support and respond to the diverse informational, cultural and leisure needs of community residents of all ages.

Collection Management librarian selectors apply their knowledge, judgment and expertise in selecting materials along with the following standard criteria. An item need not meet all criteria to be selected. Selectors also consult reviews, bibliographies and other evaluative sources.

General Selection Criteria

- Relevance to current and anticipated community needs
- Intended audience
- Suitability of subject and style for intended audience
- Critical reviews and other evaluative sources
- Number and nature of requests from the public
- Relation to the current collection and other materials on the subject
- Reputation and qualifications of the author/artist and/or publisher/producer
- Local significance of the author or topic
- Comprehensiveness of treatment
- Representation of majority and minority points of view
- Usefulness to patrons with special needs
- Relevance to the experiences and contributions of diverse populations
- Quality of illustrations and effective characterizations
- Suitability of physical form for library use
- Cost

Selectors determine the distribution and number of copies to branches based on anticipated demand, input from branch staff, physical space available in branches, local interests, and budget. Libraries recognizes that users have differing abilities and backgrounds, and therefore, provides materials of varying levels of difficulty.

Branch library collections are developed to meet the informational, educational and leisure needs of their specific communities. These needs are continually assessed by selectors and branch staff through the review of census data; evaluation of the use of the collection; monitoring community interests and activities; monitoring other services and programs available in the community; and collaborating with appropriate neighborhood organizations and schools. Evaluation tools, which assist in assessing the collections, include various reports from the Libraries' circulation system and CollectionHQ. CollectionHQ is a software application that is used to gather and analyze library circulation data from which system and branch level reports about the collection's availability, currency, condition, and use throughout the year are generated. CollectionHQ will help Collection Management and branch staff to determine customers' usage patterns; as well as to weed collections to keep them fresh and relevant. Branch library collection profiles are updated periodically to determine any significant changes within the local communities (e.g. more families, seniors, or preschoolers, a change in ethnic populations).

Each library has staff whose primary responsibility is the management of the branch collection. This staff, which interacts directly with customers, will work closely with Collection Management selectors in the development of strong local collections through ongoing communication. Selectors will solicit input and feedback from branch staff on a variety of topics about local needs.

Libraries also encourages continuing input from residents. A customer "suggestion for purchase" form and a general "comment and suggestion" form are available on the Libraries' website and at all library agencies. Regular feedback is solicited from members of the Library Board and Library Advisory Committees (LACs). In addition, staff will meet with Library Advisory Committees, Friends of the Library chapters and sometimes community groups to gather ideas about their new or renovated library collections' focus. Guidelines for authors or publishers who are asking Libraries to consider the purchase of their material(s) can also be found on the Libraries' website (Information for Authors and Others Submitting Work for Consideration by MCPL).

Electronic Resources

Electronic resources provide opportunities to expand the scope of information and materials available to users. Electronic resources include internet sites, databases, and e-books. Streaming of movies and music sites is fast becoming a popular new electronic format which Libraries will continue to investigate. Libraries have been in the forefront in the provision of new formats and technology for reading and information to its users. The impact of information in digital formats and library users' expectations to access them through their local libraries has increased tremendously.

E-books are defined as digital objects specifically designed to be accessible online and read on either a handheld device or a personal computer. MCPL subscribes to downloadable e-books

through Overdrive and e-audiobooks through OneClick Digital. Libraries also provides numerous non-downloadable e-books purchased through various publishers and vendors. E-books can facilitate information discovery through search features, expand collections, save space, and reduce costs. Customers have the option of either checking out an e-book, viewing it online, or viewing it offline by downloading it onto their personal computers, e-readers, tablets, and a variety of handheld devices.

While the general Selection Criteria of traditional formats also apply to electronic resources, additional selection criteria need to be considered in the acquisition of electronic resources.

Electronic Formats Selection Criteria

- Quality, relevance, currency, comprehensiveness and accuracy of information
- Ease of use
- Availability to multiple users, usually simultaneously
- Ease of navigation and training requirements
- Hardware and software requirements
- Technical support
- Remote access availability
- Enhancement of print equivalents in terms of speed, flexibility, and full text availability
- Reduction or elimination of the purchase of multiple copies for multiple locations
- Updating frequency
- Purchase or lease
- Cost

The increasing use of electronic resources presents different challenges for analysis. The standard methods of analyzing a collection cannot easily be applied in the analysis of electronic resources. Many electronic resources do not circulate; circulation of some e-resources is sometimes limited by the publisher/vendor. The circulation of most of these resources is not included in the Libraries' circulation system, only through vendor data reports. The reports provide the following data elements: number of sessions (logins); number of searches; number of materials downloaded; and the number of turn-aways. Circulation, cost-effectiveness, along with the increasing demand by users, and analysis of how successful the users' needs are met should also be considered. Tracing usage patterns is increasingly important as more funds are devoted to electronic resources.

E-books in public libraries changed radically in the beginning of 2011. With the increased sale of e-readers during the holiday season at the end of 2010, public libraries experienced a substantial jump in e-book use. The American Library Association's 2012 *State of American Libraries Report* states that "The proportion of U.S. libraries that made e-books available almost doubled over the past five years, climbing from 38.3% in 2007 to 67.2% in 2011." In FY11, MCPL had an 89.71% increase in circulation of downloadable e-books and e-audiobooks. In the coming years, increased usage is expected to continue to rise at startling rates, raising a host of challenges, opportunities and new realities for MCPL and other public libraries.

The e-book industry is in a state of rapid flux and rapid growth with new developing trends which will push libraries to implement new collections, services, and lending solutions. With new entrants into this industry and major advances of current players, assessing what is on the

market can be a challenge. MCPL will need to stay informed and engaged in this ever-changing e-book market. Libraries' users have high expectations in having libraries provide more e-books, which is complicated by budgetary restraints. Being familiar with the myriad of issues will assist MCPL to make informed decisions about better systems for e-book and e-reader use. It will also assist Libraries in the provision of a balanced collection of print and electronic books.

World Languages Collections

MCPL currently has Chinese, French, Korean, Russian, Spanish and Vietnamese collections at various branch libraries throughout the County. These collections are popular browsing collections of books, magazines, and newspapers that provide leisure reading to children and adults. These collections reflect the literature and interest of multiple cultures living in the County. These collections are not intended to offer the breadth of information offered in the English language collection. The primary audience is recent immigrants who need practical, educational and recreational reading for themselves and their children in their first language. Speakers of English who are students of another language, especially students in the Montgomery County Public Schools, are a second target group. The Montgomery County Public School system reports that students come from 164 countries and speak 184 languages. Of these, 13.1% participate in English as a Second Language (ESL) classes. MCPL provides English as a Second Language (ESL) CD-books, DVDs, workbooks, and two databases that assist foreign-born users to learn English. More and more databases that Libraries provide also have the capability to access the information in a user's native language.

The languages currently in the collection represent the largest linguistic groups of new immigrants in the County as determined by the U.S. Census Bureau, 2010 American Community Survey, Maryland National Capital Park and Planning Commission and Montgomery County Public School data.

Montgomery County's population projections for FY12 to FY18 reveal that its population will continue to increase and become more diverse, both ethnically and racially. The increase in diversity from 2000-2010 resulted in the county becoming a majority minority county for the first time.

During the next four years, location or relocation of these world collections, as well as the addition of any new language collections or a new site will be determined by the following criteria:

- The review of the most current census demographic information.
- The percent of the speaker population in the community. Libraries will work with the Office of Community Partnerships on an annual basis to determine this percentage which is based on current census data for Montgomery County.
- Level of participation in County ESL programs and related programs for immigrants.
- Expressed demand, including individual requests from groups, ESL teachers and programs, and branches. Patterns of these requests will be used to guide the addition of selected magazines, donated materials, small collections of children's and other targeted materials; and to determine which languages merit a browsing collection.

- Immersion programs in service areas and other patterns of demand by speakers of English will be considered in determining the need for small focused collections.
- Libraries' budget, the cost of purchasing materials fully processed, or the capability and cost of purchasing bibliographic records.
- Availability of databases in world languages that will serve a wide range of customers.
- Availability of grants, endowments, etc. to establish new world language collections.
- The increased growth of e-books offers a viable solution to the inclusion of additional world language materials into the MCPL collection.

MCPL will also work closely with the Office of Community Partnerships and the Literacy Council of Montgomery County in the development of future world languages collections. The Office of Community Partnerships coordinates the County's efforts to monitor, evaluate and improve its services to the County population with limited English proficiency (LEP). Montgomery County has a policy that requires agencies serving the multilingual population to make reasonable efforts to provide language-appropriate services in some of the most used languages in this County.

Gifts

Gift materials are accepted with the understanding that the same standards of selection are applied to gifts as applied to materials purchased for the collection. Gifts are accepted with the understanding that they may not necessarily be added to the collection. Gifts, which can expand ownership and availability of titles in the Libraries's collection, will be accepted and placed in branches throughout the system. Gifts not added to the collection may be sold by the Friends of the Library, Montgomery County, Inc. or its chapters. Proceeds are used to enhance library services in the County. Libraries reserves the right to the disposition of the gift materials. Libraries may choose not to accept some gifts.

Some general guidelines in the acceptance of gifts are: materials should be no older than three years old; materials must be in good condition; limited magazine titles are accepted; textbooks, encyclopedias and curriculum materials are not accepted. Libraries will give a donor an acknowledgement of receipt, which may be used for tax purposes, stating the number and types of materials, but not their value. It is the donor's responsibility to determine the value of their materials.

Gift materials and funds are often given in memoriam. In this case, prospective donors should contact the manager of the Collection Management division to discuss the various aspects of the gift.

Local Authors Program

The Local Authors Program provides an ongoing way for Montgomery County residents who have published books to be part of the cultural conversation of the community, where the work would not otherwise be selected for inclusion in the Libraries' collection. A single copy only, of a book by a Montgomery County resident, may be sent to the Cataloging and Processing supervisor to receive a brief catalog entry and minimal processing. The book can then be placed

on a Local Authors Shelf in the branch designated by the resident without further evaluation for inclusion in the collection. Library managers may choose to begin a Local Authors Shelf after consulting with the Manager of the Collection Management division.

Opening Day Collections

Libraries uses "opening day collection" in many ways, but ultimately, it always means the collection that is in the library when the building opens (or re-opens) for the first time. In some cases, the entire collection is new. Libraries also uses "opening day collection" to refer to specific collections (YA, genealogical, audio books, etc.) as an area that is being highlighted on opening day. The makeup of those collections varies widely.

Prior to the closing of a library which is to be renovated or expanded, a checklist should be developed to include the following information:

- Weed all collections of worn materials. Do not pack and store these materials.
- Weed outdated materials, i.e. videos which will not go back into the new collection.
- Assess the need to move specific collections before the branch's closure to other branches which will be impacted. Identify those popular and high demand materials to be moved.
- Determine the highest circulating collections (book stock, percentage of total collection, turnover rate).
- Identify new collections or collections which need expansion as identified in the Facilities Project Specifications. (Ex. if a small business focus is planned determines number, types and currency of already owned materials.)
- Collect subjects or titles for which customers are asking but are not currently owned by Libraries. This information will help when developing the opening day collection.

Looking to the future, Libraries' print collections are being reduced in favor of electronic resources which provide more convenience, improved access, and the reduction of physical space which is usually needed to house a print collection. MCPL and other libraries are realizing that customers are seeking other uses of library space such as small and large tutorial rooms, discovery rooms, computer labs, etc. Reference and magazine collections which require continual updating and currency are the collections which can best be changed from print to electronic. Opening day collections of new or renovated MCPL branches should look to discontinue these print collections and provide electronic access. Current print magazine subscriptions are already offering them online simultaneously. To enhance this new magazine service, it will be necessary to also purchase handheld devices to allow customers to easily access and read "ezines." MCPL currently has some reference materials available electronically. Use of reference materials should continue to be assessed to determine other reference materials that should be purchased electronically rather than print

The DVD/movie industry is also starting to change due to such new advances such as pay-per-view, streaming, Netflix, etc. Some Maryland public libraries have already seen a decrease in circulation of their feature films and an increase in network, PBS and cable television shows. Collection Management will need to closely watch this market and any changes in this

collection's circulation and adjust the purchase of DVDs accordingly prior to opening a new library.

With early literacy as a goal of the MCPL FY13-FY16 Strategic Plan, and the inclusion of "early literacy children's areas" in new or renovated libraries, children's materials should be purchased in quantities to meet the demands of the communities.

Merchandising is one of the best ways to market a library's collection. Self-standing display units, end of aisle displays, and ample top and bottom library shelves should be included to allow for effective merchandising of the new opening day collections.

2. Cooperative Arrangements

Montgomery County Public Libraries has many cooperative arrangements with organizations and groups. The goal of these agreements is to expand Libraries' capacity to make more information and resources accessible to residents; and, the leveraging of available funds. Resource sharing offers County residents a wide range of historical, research oriented and specialized materials which Libraries would otherwise not be able to provide. The following is a list of MCPL's cooperative agreements.

- Interlibrary loan is the most familiar to users. Materials from libraries across the United States can be located and reserved through the Maryland State Marina and Online Computer Library Center (OCLC) systems.
- Montgomery County Public Schools – shared school booklists for summer reading
- Library for the Blind and Physically Handicapped – This organization provides comprehensive library services to eligible blind and physically handicapped residents of the State of Maryland (e.g. digital books and players, Braille materials).
- Federal Depository Library Program – As a member, the Rockville Memorial Library provides access to U.S. Government documents online and a selection of print government documents. Libraries' catalog contains records for the print documents received under the program.
- Montgomery County Historical Society – This library's collection holdings are listed in MCPL's catalog.
- Maryland Consortium – Provides access to downloadable audio and e-books through the MCPL website
- Maryland state agreement with several database vendors in the provision of special pricing for Maryland county library systems.

3. Materials Deselection

Material deselection, or weeding, is the process of removing materials from the active collection for withdrawal or transfer. It is an essential element of collection development that ensures Libraries' materials are useful, accessible; and, that Libraries continue to maintain quality collections. Branch collections are regularly reviewed to assure their currency and usefulness. Some of the guidelines used by staff are:

- Condition of materials
- Outdated materials
- Accuracy of information
- Improve access to the collection by staff and users
- Alleviate space problems
- Identify collection gaps
- Items no longer of interest or in demand
- Unused duplication

Other evaluative tools that staff use to make informed decisions about the removal or the transfer of materials are reports from Libraries' circulation system and CollectionHQ. With the increased use of electronic resources, periodical and reference collections will continue to be assessed to determine the most appropriate format to offer these materials to library users.

Withdrawn and discarded materials cannot be given or sold to individuals or organizations. Periodicals and newspapers must be discarded. Materials in poor condition must be recycled. All other materials withdrawn from the Libraries' collections will be sent to the Friends of the Library, Montgomery County, Inc.

4. Intellectual Freedom

Basic to the Collection Policy is the American Library Association's Library Bill of Rights, Freedom to Read Statement and, the Freedom to View Statement. These statements pertain to all information formats, including print, video, audio, digital and electronic formats.

Libraries assure that the collection is open and accessible to all residents. It is committed to a well-balanced print and electronic collection which presents various points of view on all subjects, controversial or not. Libraries does not remove, restrict or withdraw materials because they are regarded as discriminatory or inflammatory by an individual or group. Libraries seeks to meet the community's needs, and recognizes that some materials may be controversial. It is the responsibility of each library user to choose materials which suit their individual tastes and needs. Individuals are free to reject materials for themselves that they do not approve; but they may not restrict the freedom of others to read, listen, or view what they are interested in. Responsibility for children's use of library materials rests solely with their parents or caregivers.

Conclusion

Montgomery County Public Libraries is committed to anticipating future user and community needs and expectations to help the Libraries design and provide collections to meet them. Input from the community will continue to be a high priority in the future development of the Montgomery County Public Libraries' collection. New materials and formats that meet the community needs will be reviewed according to the selection criteria and purchased as resources allow. Technological advances, societal values, and cultural differences require flexibility, open-mindedness, and responsiveness in the evaluation and re-evaluation of all Libraries resources.

Montgomery County Public Libraries

Where the County Reads, Where the County Meets, Where the County Learns

FY13 – FY16

Facilities Plan

Building 21st Century Library Communities: Refresh, Renovate and Redesign

Executive Summary

The Montgomery County Public Libraries' Facilities Plan for the FY2013 to FY2016 presents the strategies to preserve, refresh, renovate and build a 21st Century library system throughout Montgomery County. The plan's goals and objectives reflect an all-encompassing view of the County's diverse communities and their library needs and expectations, the trends and technologies for providing excellent services, and innovative ways to connect communities and libraries.

One of Montgomery County Public Libraries' (MCPL) strategic objectives for FY2013 -FY2016 is: "Build a community through the Montgomery County Public Libraries Facilities Plan." The plan's strategy accomplishes this objective.

Facilities Plan Objectives:

- Implement a fiscally responsible approach for evaluating and recommending building plans for facilities.
- Increase the frequency of facility evaluations from five years to three years as a cost-saving approach for the maintenance and refresh of buildings.
- Incorporate new and emerging technologies and tools into our building structures.
- Present opportunities for change and flexibility to suit community needs and targeted audiences.
- Provide a public input process to gather continuous participation from communities.
- Ensure ADA compliance.

Montgomery County's population projections for FY2012 to FY2018 reveal that its population will continue to increase and become more diverse, both ethnically and racially. Montgomery County population increased 11.3% from 2000 to 2010 – from 873,341 to 971,777 residents. The increase in diversity from 2000 to 2010 resulted in the County becoming a majority minority county for the first time.

This Facilities Plan considers the following elements in the decisions and recommendations for each library building, current and future: anticipated population growth, geography, commercial development patterns, transportation routes, library service needs, library service delivery and technology trends, staffing models, existing library facilities and the role of the Montgomery County Public Libraries in the communities.

The Facilities Plan has been written with the premise that the brick and mortar public library in 2016 will exist in Montgomery County, but with completely different content and purpose. While authors of current library literature may disagree on the future of the public library and some may support the disappearance of the brick and mortar facility, there is almost universal agreement on one role for the brick and mortar public library: the library as the community connection hub – to ideas, learning, and the exchange of information. This supports a fundamental mission of libraries -- to improve society through facilitating knowledge creation in communities and to inspire and inform.

The plan serves as the basis for all new and improved MCPL facilities over the next four years and will serve as the model for future plans beyond 2016. The plan will be implemented in various phases in the communities as dictated by needs and capabilities. It will be the basis for ongoing fiscal and land-use planning for the future in the development and operation of library facilities throughout Montgomery County.

To achieve its public service mission and maintain vital public library facilities over the next four years of the plan, five categories are recommended as the building framework to move the library system into the 21st Century. All MCPL facilities will be evaluated according to an established timeframe and placed in the appropriate category from the list below:

- Refresh
- Renovate
- Redesign and build a new library
- Reach beyond our walls to deliver library services
- Realize synergies: collaborate with partners and create co-location strategies to deliver library services

A key component of the plan is its evaluation methodology to ensure the maintenance and sustainability of all MCPL public facilities. MCPL will evaluate its facilities on a programmatic timeline to prevent long-term deterioration of the buildings. Each structure will be evaluated every three years and necessary maintenance will be completed within five years from the evaluation process. Funding for the interior refresh and maintenance of four branches every year will be part of the Libraries' Operating Budget and funded as a separate line item.

The renovation and redesign/build evaluation methodology provides a 20-25 year programmatic renovation cycle for each of the existing buildings. MCPL and the Department of General Services (DGS) will work to identify safety and security issues at the ten-year midpoint for inclusion in the County's Capital Improvement Program (CIP) budget.

In communities where no library services exist, several factors are considered in determining if a new service point will be recommended and what type it will be. Factors include: proximity of public transportation and major roads, proximity of other MCPL service points, overall library system service delivery strategy and how the new location of the service point fits into the Libraries' Strategic Plan and Facilities Plan. In addition, when a building is closed for major renovation or a re-design/replacement, MCPL will provide interim services for the affected communities until the renovated or new building opens.

The Facilities Plan is a subset of the Libraries' Strategic Plan FY2013 – FY2016 and is a complement to the Libraries' Marketing, Technology, and Collection plans. The Facilities Plan will use the areas of focus in the Strategic Plan to determine priorities for buildings, interior design and service needs.

In keeping with the Montgomery County values established by the County Executive, MCPL strives for inclusiveness and transparency in Facilities Planning and decision-making. The Library Department and the Department of General Services, Building Design and Construction section, in collaboration with the County Office of Management and Budget, the Library Board, and the Library Advisory Committees determine priorities of current library facilities for refreshing, renovation or redesign and replacement. Additionally, decisions are made using specific criteria to determine the need for point of service locations and new buildings for new locations. With respect for County residents and their input into the Facilities Planning, the Library Department and DGS have a history of involving the public through multiple meetings held in their communities.

To achieve the Libraries' public service mission to maintain and build 21st Century Libraries, the Montgomery County Public Libraries' Facilities Plan for FY2013 – FY2016, places an emphasis on the following: evaluate and complete the interior and exterior maintenance of current brick and mortar library buildings on scheduled timelines; incorporate new technologies to expand its delivery of services beyond the Libraries' walls; build partnerships with other County agencies and non-profits to co-locate library services and to provide services and materials to senior housing communities; and distribute library services through kiosks, virtual services, and interim branches to strengthen those communities that do not have a physical branch within 3 - 5 miles.

Introduction

Montgomery County residents and their neighborhood communities are at the center of the service priorities within the Facilities Plan for the Montgomery County Public Libraries (MCPL). New ways of service continue to emerge in the library profession. As a result of new technologies and the growth of customer expectations and needs, MCPL is forging an approach based on professional knowledge and awareness of community. This new approach requires a change in types of services and building configurations, the skills and preparation of library staff, and ultimately a new relationship with Montgomery County communities. Libraries has a long tradition of thinking beyond its own walls to serve its communities and regularly seeks input from them. MCPL will evaluate and repurpose itself on an ongoing basis in order to remain viable as the community's connection hub to ideas, learning and the exchange of information.

Service in each community is based on the needs of that community and the proximity of similar services nearby and virtual. The Facilities Plan will serve as a guide to assist MCPL in delivering relevant library services, technologies, programs and materials to its customers and communities. MCPL, in collaboration with the communities and stakeholders, will assess needs and propose solutions. MCPL will evaluate the facilities and assign one of the following actions:

- Refresh and provide maintenance for the existing library building;
- Renovate and re-configure the current building;
- Re-design and build new facilities;
- Reach beyond our walls to examine opportunities to deliver and implement library services via technology based on community needs; or,
- Realize synergies: collaborate with partners and create co-location strategies to deliver library services.

Libraries' services in 2012 were delivered from 18 brick and mortar structures offering a complete range of services, collections, programs and community meeting spaces. Three additional facilities and two points of service encompass the Library Department's current range of services and provide alternatives to the full-service model that MCPL has traditionally offered. The Department realizes that, over time, a community, its environment and the work modality changes and buildings age. As a library system matures, existing facilities require consistent preventative maintenance and a targeted program for replacement of major equipment and building systems to ensure they remain clean, safe, in compliance with local building codes, and usable by the public and staff. The buildings must also remain ADA compliant and adhere to new regulations mandated by the U.S. Department of Justice.

In addition, because of changes in demographics, technology, staffing models, users' expectations of the library collections and services and the recognition that the library is an alternative to home or work as a destination, interior spaces in current library buildings must be redesigned, refreshed and remade. These changes to interior space must happen more often than the physical plant renovations in order for services offered within the buildings to be current, viable, and responsive.

Montgomery County population, which was 971,777 in 2010, will continue to increase an average of approximately 9,200 persons each year throughout the next eight years reaching over one million by 2014 and nearly 1,045,400 by 2018. There were 357,086 households in the County in 2010 and current projections estimate the number of households to increase to 364,900 in 2012. The County's senior population continues to grow with an estimated 119,769 persons 65 and older living here in 2010 and projected to increase to 154,061 by 2020. The County expects the public school student enrollment to increase by 7,062 between FY2013 and FY2018. In fiscal year 2011, 70% of Montgomery County population were registered users of the Montgomery County Public Libraries. The table below reflects population projections for current and future planning.

Trends and Projections: County Executive's Recommended FY13 Operating Budget and Public Services Program FY 2013- FY 2018

Demographics: Montgomery County MD	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY18
Population	980,620	989,540	998,540	1,007,620	1,017,000	1,026,380	1,035,850	1,045,400
Annual Increase	16,520	8,920	9,000	9,080	9,380	9,380	9,470	9,550
Population Growth Since 2003	7.2%	8.1%	9.1%	10.1%	11.1%	12.2%	13.2%	14.2%
County Resident Births (Prior Year)	13,400	13,530	13,650	13,750	13,850	13,950	14,030	14,120

Montgomery County Maryland Government, Office of Management and Budget, March 15, 2012

Facilities Evaluation Methodology

In keeping with the Montgomery County values established by the County Executive, MCPL strives for inclusiveness and transparency in Facilities Planning and decision-making. The Library Department and the Department of General Services, Building Design and Construction section, in collaboration with the County Office of Management and Budget, the Library Board, and the Library Advisory Committees determine priorities of current library facilities for refreshing, renovation or redesign and replacement. Additionally, decisions are made using specific criteria to determine the need for point of service locations and new buildings for new locations. In respect for County residents and their input into facilities planning, the Library Department and DGS have a history of involving the public through multiple meetings held in their communities. Chapters 1 - 5 detail the criteria, the methodology for establishing MCPL facilities' priorities, and background information.

The categories for facility recommendations:

Refresh – to restore, energize, revive, revitalize, stimulate, update. (Chapter 1)

Refreshing a facility can include: carpeting and painting, facility safety issues, roof replacement, and HVAC/Electrical replacement. It can be the re-configuration or addition of a "Teen Space," "Senior Space," "Early Literacy Space," or "Disability Resource Space." Libraries' customers are suggesting the addition of tables, electrical outlets and seating in an area for customers with laptops who use library WIFI and/or need to power up their laptops, smart phones and e-devices. The configuration of Smart Room technologies for community meetings, programs and lectures will encourage added use of the meeting rooms and result in stronger connections between libraries and communities.

Renovate – to overhaul, modernize, resuscitate, resurrect. (Chapter 2)

MCPL's Facilities Plan will assess whether or not the current building has the right dimensions to provide 21st Century library services, meet current and projected population density, address the County's increasing diversity, and the library customers' changing information needs. Renovations will replace dated and worn furniture and outdated/outmoded equipment (including telephone systems) with more efficient equipment. Renovations will also update the building requirements due to technological changes and other factors.

Redesign and Build New Facilities – to plan and fashion the form and structure of a building, the combination of details or features of a building, architecture, depiction, and diagram. (Chapter 3)

Brick and mortar facilities will be designed with flexible and adaptable space to meet changing technology, program service delivery and the evolution of materials development and use. In communities where no library services exist, many factors are considered in determining whether or not a new library location will be recommended and what types of services will be needed. A minimum of 5,000 residents must reside within a five- mile area for a new service point to be considered.

Reach beyond Our Walls to Deliver Library Services to Customers and Communities – the provision of information and reference assistance electronically and virtually to customers wherever customers are located via telephones, smart phones, email, chat, customer questions posted on the Department’s website, and via e-devices connected to the Internet. (Chapter 4)

The range of services delivered beyond the Libraries’ walls includes Libraries’ staff who provide virtual information services; the placement of book and media kiosks in locations where service is needed; and, interim library services to serve communities when their library branch is under major renovation. The Libraries’ website, which has research databases, downloadable e-books, information, downloadable music, and tutorials, also provides virtual services to customers wherever they are located.

Realize Synergies: Collaborate with Partners and Create Co-location Strategies – the working together of two or more organizations, especially when the result is greater than the sum of individual effects or capabilities. (Chapter 5)

MCPL has a history of successful partnerships and an ongoing interest in collaborating with County departments, non-profits with mutual interests, and exploring opportunities to co-locate library services with senior housing communities, and other communities such as White Flint and Shady Grove.

What Montgomery County Residents Have to Say

The Library Department and DGS have a history of involving the public in library planning for the new facilities and for major renovations. Participation in the process includes stakeholders from across Montgomery County, County departments and agencies, community and neighborhood representatives, Library Board of Trustees, Library Advisory Committees, and library staff. To achieve these goals MCPL will hold a minimum of three public meetings to inform the community of design plans once the design begins on a renovated or new facility and to discuss alternative means of delivering service.

From public input into the future of MCPL buildings, the following recommendations were articulated:

- Provide more services beyond library walls (i.e. mobile, online).
- Provide more self-service hardware for customers’ use.
- Teach customers how to utilize useful and complex data sources.
- Build new and restructure current branches to be more flexible and accommodate new technologies.
- Advocate for resources from the County and other sources to keep moving forward.
- Seek diversified funding sources and key funding opportunities to support more technology and materials.
- Engage more frequently with communities to gather feedback on refreshing existing library buildings and technological capabilities.
- Be open to changes in the library system.

1. Refresh and Maintain Current Facilities

This Facilities Plan provides a structured planning process for a refresh and maintenance assessment that provides an integrated appraisal of a facility's ability to deliver efficient, effective current programs and services. MCPL places an emphasis on interior and exterior maintenance of current brick and mortar buildings. This will be accomplished through a programmatic evaluation of each branch on a three-year cycle with the work to be completed by the fifth year.

Four branches per year will undergo interior and exterior refresh and maintenance review. The interior space in current buildings may need to be refreshed to keep pace with anticipated changes in demographics, technologies, customer expectations of services and staffing models. MCPL will refresh its facilities on a timeline in order to prevent long-term deterioration of the building, which usually results in the closing of the library in order to renovate. The impact on the Libraries' communities when a branch closes for a major renovation is difficult.

Definition

The refresh and maintenance assessment will ensure that: a) the County's capital investments are protected by maintaining the Library Department's building infrastructure, b) all new construction codes (ADA, fire, energy, safety, etc.) are addressed and implemented, and c) critical equipment (boilers, chillers, fire suppression etc.) and building systems (roofs, windows, lights, etc.) are overhauled or replaced prior to their failure. This assessment will also place an emphasis on the timely reorganization of internal space of each physical branch to insure that it is fully utilized based on the needs of the community for programs and services.

Refresh and maintain a facility includes the following:

Carpeting and Painting: Libraries receive heavy public use; therefore, carpeting wears rapidly and interior painting fades, chips or is stained. Projects for replacement of carpeting and painting should be scheduled to minimize branch closure. The Department's Operating Budget will include requests that will support the necessary work.

Preventive maintenance and minor work: Examples include replacing windows and blinds, repair of electrical outlets and restroom facilities.

Roof replacement: Full or partial roof replacement is based upon the condition and age of the facility. Roofing projects are usually conducted without closing the facility and regularly occur without major disruptions to public library service.

HVAC/Electrical Replacement: Heating and air conditioning equipment replacement/major repair projects are completed using criteria established for all County buildings. Components of HVAC systems (chillers, boilers, air-handling units) may be replaced while libraries are open to the public. Lighting retrofits for energy efficiency may also be done while library buildings remain open to the public.

Refreshing the Interior Space: Examples include creating a Teen Space, Children's Discovery Room, Senior Resource Center, Disability Resource Center and/or expanding the technology footprint of the branch.

Background

The planning and life cycle assessment timetable includes several predetermined steps: 1) the refresh/maintenance cycle for each building system, 2) the schedule for interior refresh and maintenance to accommodate programmatic and library service delivery changes, and 3) the methodology for responding to change in the community's service delivery needs. The planning and three year assessment will result in library
MCPL FY13-FY16 FACILITIES PLAN

buildings that are accessible to residents, while maintaining an inviting, comfortable, and safe physical facility to deliver library services.

Methodology

- Based on the communities' input as well as regular review of the branch quarterly reports, the Department will assess the need to refresh the interior space in order to respond to the community's evolving service needs.
- All critical systems will be evaluated no less than every three years after initial construction/replacement of a building. This assessment will evaluate the need for new carpeting, painting, roof replacement, and repaving/relining of parking lot surfaces to further protect the County's investment in the library building structure and to avoid the negative image of the County created when a building's interior/exterior condition has significantly deteriorated.
- As part of the three year cycle, the Department will recommend if the branch should be refreshed, and the level and extent of maintenance required.

2. Renovate Current Facilities

Renovation planning is a process that looks at a building and its delivery of services as an integrated whole. This overall systematic analysis of the building on a reasonable timetable is critical to maintaining adequate, safe and up-to-date public facilities. Given the level of public use, the County's changing demographics, and the rapidly evolving technological environment, the current 30 year renovation cycle is inadequate to maintain a safe, clean and operable building with an acceptable high-quality public service program. MCPL proposes the cycle be changed to a 20 year cycle.

Definition

MCPL's Facilities Plan will assess whether or not the current building has the right dimensions to provide 21st Century library services, meet current and projected population density, address the County's increasing diversity, including aging populations and people with disabilities, and the library customers' changing information needs. For example, renovations will replace dated and worn furniture and/or outdated/outmoded equipment, including telephone systems to more efficient equipment. Renovations will also review and update the building's infrastructure requirements in response to technological changes at the time of the review and will ensure compliance with ADA.

Background

There are two stages to the renovation cycle. The first is at ten years and the second is at the twenty year life cycle of the building. Each stage is based on the anniversary date of the facility's original construction date, or the last renovation planned lifecycle assessment date. For example, the ten year asset replacement assessment will evaluate the need for repaving/relining of parking lot surfaces to further protect the County's investments. Planning will also insure the Library buildings, whose service areas overlap or whose residents interchangeably use them, will not be closed for renovations at the same time.

Methodology

Facility reviews with the Department of General Services will be performed prior to the ten and twenty year dates. In collaboration, both Departments will do full programmatic major renovation assessments in order to:

- Determine if the building size is appropriate to meet current and projected service demands by studying the changing population density; key demographics of the population; program emphasis; and changing information formats.
- Replace dated furniture and equipment to meet the needs and expectations of the community.
- Review the interior space to more efficiently utilize staff.
- Assess service delivery methodology to address changing ways of doing business.
- Ensure any renovations include planning for ten years of growth in the design.
- Provide the program of requirements (POR) and Facilities Planning documents necessary to include the facility in the appropriate CIP budget cycle.
- Suggest changes/deletions/additions from community groups and decide what will be incorporated in the draft POR.
- Submit the renovation library project in the biennial CIP budget program six years before the targeted renovation/new construction dates.

3. Redesign and Build New Facilities

The Library Department will evaluate the need to build/lease/establish a new library building or point of service, or to replace a current facility based on several criteria. These criteria include: Department and branch usage statistics, recommendations in the Maryland National Capital Park and Planning master plans, current and projected demographic information, and input received from community groups and commissioned studies.

Definition

Brick and mortar facilities will be designed with flexible and adaptable space to meet changing technology, program service delivery and the evolution of materials development and use. In communities where no library services exist, many factors are considered in determining whether or not a new library location will be recommended and what type of services will be needed. A minimum of 5,000 residents must reside within a five mile area for a new service point to be considered.

Background

A Program of Requirements (POR) will be developed by the Department eight years before the year in which the replacement (new construction) is slated to be done. The draft POR will be reviewed and approved by an established list of Directors and key County Department staff prior to the submission for Facilities Planning in year seven before the anticipated construction start year date.

Department of General Services, Building Design and Construction section staff will review the approved POR and determine feasibility and costs associated with the specifications outlined in the POR and will submit the project in the biennial CIP budget program six years before the targeted replacement (new construction) date.

The Office of Management and Budget, County Executive, and County Council will recommend Library CIP projects for funding so that design will begin on or before the renovation year [identified] and completion of construction will occur within five years of the renovation date.

The approved POR and CIP project will be reviewed again and updated one year before design work is funded to begin. The review and updating will include, but not be limited to, changes to programmatic and service delivery descriptions, target audiences, and staffing models. Appropriate modifications to CIP Budget funding will be made in the next CIP cycle.

Methodology

Montgomery County Public Libraries will evaluate and repurpose itself on an ongoing basis in order to remain viable as the community's connection hub to ideas, learning, and the exchange of information. The Planning Assumptions for New Facilities and Replacement of Existing Buildings will consist of the following criteria:

- General assumptions of population density and distance to a current facility or service point.
- Assumptions specific to new facilities.
- Assumptions to replace existing facilities.

General Assumptions of Public Involvement, Population Density and Distance:

- The number of Montgomery County residents using library services will likely remain stable at approximately 65% of the population.
- Before MCPL considers new or replacement library services, it will consider:
 - The proximity of other library facilities and the ability of those facilities to adequately provide service to the population in the new/replacement library service area.
 - The demographics for future years.
 - Current and future ability to operate and maintain a facility.
 - The library services requested by the community (including technological changes).
 - New delivery methods to be offered by the new/replacement facility.
 - The options available to the Library Department to provide those services.
- Library service will be no further away than five miles in urban areas and 20 minutes by car in rural areas for 80% of Montgomery County residents.
- Brick and mortar facilities will be designed to meet ADA requirements.
- A process of public engagement in the planning and design of each library will be utilized in order to ensure that the County meets neighborhood needs and expectations.
- A minimum of three public meetings held during the schematic, design and development, and final construction document phases of the project will be held.
- All facilities or service point delivery stations will provide an appropriate and safe work environment for staff.

General Assumptions specific to new facilities:

In communities where no library services exist, the following factors will be considered in determining if a new service point will be recommended and what type of service point it will be:

- Proximity of public transportation and major roads.
- If residents will need to drive to the facility to use it, availability of sufficient land for adequate, safe parking.
- Proximity of other MCPL service points to absorb more traffic using the strategic measurement of “foot traffic per hour opened.”
- Proximity of other metropolitan DC area library system service points.
- Current and 15 year population forecasts.
- Availability of land or leased/County buildings for establishing library services.
- Overall library system service delivery strategy and how the new location fits into Libraries’ Strategic Plan and this Facilities Plan.
- Brick and mortar facilities will be designed with flexible and adaptable space to meet the changing technology, program, service, and materials developments in the library world.
- Layout, design and signage will promote self-service options whenever possible.
- Customer safety and security will be considered in the placement, layout, design and implementation of self-service service points.

General Assumptions specific to replacing existing buildings:

- MCPL will consider the use of virtual or non facility based library services (downloading, streaming, 24/7 website access, etc.) which are anticipated to grow more quickly in the future than traditional facilities based services.
- In communities where library services already exist, current and anticipated usage of the facility, nearby libraries, as well as the availability of land/sites for additional new buildings, and population growth estimates will determine whether an addition is necessary.
- The condition of the building must be taken into consideration.
- The size of a new building, or the addition to a current building, will be determined using a “building blocks approach” which will calculate space needs based on current and projected population, service demands, and usage, as well as similarity to other MCPL libraries and/or service points, expressed community needs, existing standards, and staff input.
- Service points requiring staff will be designed to use staff as efficiently, effectively, and safely as possible.
- MCPL will use the most effective and updated communication technologies for service delivery among assigned staff.
- Delivery service points not requiring staff will be provided in inviting, safe, clean, and well lit locations.
- MCPL will meet the service needs of the community in a “green” manner with the goal of earning a minimum of Silver LEED certification for new and renovated building construction.
- Library service will be located near places where the community congregates, and which have major traffic arteries and easy access to public transportation.
- Service will be designed to complement the neighboring community.
- Co-locations with other County Departments and outside agencies will be considered whenever appropriate.
- Non-traditional sites for delivery of library services in malls, banks, stores, medical complexes, etc. or through kiosks, media self service boxes, etc. will be investigated and implemented when appropriate.

4. Reach beyond Our Walls to Deliver Libraries' Services

Definition

Reaching beyond the Libraries' walls to residents and communities without nearby library services is a strategy and solution that provides residents with information and materials. Methods to provide County residents with library services beyond the walls include:

- Library Kiosks and Library Media Boxes -- The kiosks provide automated and self-service options in a non-library staffed location. Customers may borrow books, CD books and DVDs and return materials in a book drop. Media Boxes hold DVDs and book vending machines hold books for adults, teens and children. Lockers to hold books requested by customers may also be available.
- Emerging trends and new technology -- MCPL will follow and investigate new and emerging trends and technology that will reach communities beyond our walls.

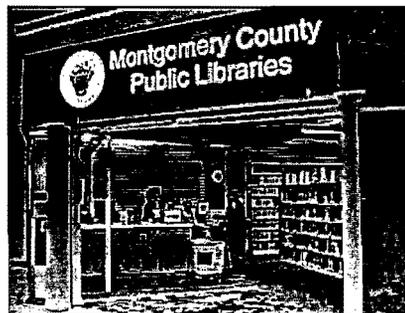
Background

The impact on a community when a library building is closed for renovation is extremely disruptive. Residents of all ages depend upon their community library for multiple services and may not have the ability to travel to other MCPL branches. Kiosks and/or interim branches are solutions to providing several services to residents in addition to the virtual services offered from a customer's telephone, smart phone, computer, or Internet e-devices.

Example of an interim branch solution for a library branch undergoing a major renovation: The Gaithersburg Interim Library Branch

The first interim branch service offered in recent years when a library building was undergoing a major renovation is the Gaithersburg Interim Branch. The interim branch was opened in December 2010 to provide library services to the Gaithersburg community while the renovation was underway. The renovation is projected to be completed in spring 2013.

The Gaithersburg Interim branch, which has a small staff, provides express service to customers. This includes: focused print and non-print material collections for checkout, information/reference service, holds pickup, limited seating, but no Internet PCs. The interim is located in a 3000 square foot storefront in the Lakeforest Mall. The photo below shows the Lakeforest Mall entrance to the interim branch.



Example of a kiosk solution for a library undergoing major renovation: MCPL Express @ Olney.

In December of 2011, the Montgomery County Executive announced that the Library Department, in collaboration with the Department of Recreation and the Department of General Services, would be providing partial interim library service to the Olney community in the spring of 2012 using a kiosk library solution. The kiosk is located at the Longwood Community Center and is available while the Olney Library is closed for renovation. Final completion of the building renovation is expected in early fall 2013.

What you will find at MCPL Express @ Olney:

The services provided are: current books for both children, teens and adults in a book vending machine; media (DVDs, potentially CDs) in a media vending machine; pick-up of customer holds in a materials locker system; and, drop-off of library materials in an inside book drop. The location at Longwood Community Center provides: a safe indoor location monitored by County staff; plentiful parking; an ADA accessible facility; and sufficient space for the library system to provide materials for checkout, holds fulfillment, and the return of library materials.

(1)

(2)

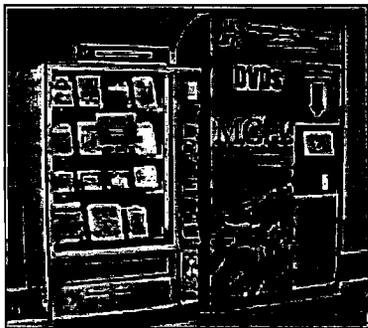


Photo 1: Book Vending Machine and Box (DVDs)

Photo 2: Exterior of Longwood Recreation Center

Methodology

In communities where no library services currently exist, several factors are considered in determining if a new service point will be recommended and what type it will be. Factors include:

- When major renovations or a re-design/build closes a branch library, MCPL will provide interim services for the affected communities until the renovated or new building opens.
- The proximity of public transportation and major roads.
- The proximity of other MCPL service points.
- The overall library system service delivery strategy.
- How the new location of the service point fits into the Libraries' Strategic Plan and Facilities Plan.

5. Realize Synergies: Collaborate with Partners and Create Co-location Strategies

As stated in the previous chapter, “several factors are considered in determining if a new service point will be recommended and what type it will be.” “These factors also work well when considering partnerships and co-location strategies. The factors include: proximity of public transportation and major roads, proximity to other MCPL service points, overall library system service delivery strategy and how the new location of the service point fits into the Libraries’ Strategic Plan and Facilities Plan.

How the partnership or the co-location strategy fits into the Libraries’ Strategic Plan and Facilities Plan is a major consideration when either the Libraries’ are approached by possible partners or the Libraries’ are suggesting opportunities to others.

Definition

The working together of two or more organizations, especially when the result is greater than the sum of individual effects or capabilities.

Background

Examples of current MCPL partnerships include:

- The Noyes Library for Young Children is a joint partnership between MCPL and the Noyes Foundation. The Noyes Library for Young Children provides a defined service for a specific audience (children under age 5 and their parents/caregivers) using a specialized set of resources and related programs.
- Montgomery County Correctional Facility (MCCF) Library is a partnership between MCPL and a County Department – Montgomery County Correctional Facility. The Correctional Facility Library provides a defined service for a specific audience that helps the inmate population find the general information they need to assist with their legal matters.

An example of current MCPL co-location strategy:

- The Damascus branch library is co-located with the County Recreation Department’s Damascus Senior Center. The Center offers a wide range of activities and amenities that are available to seniors, including entertainment, an array of movies, informational speakers, dances, theme events and wellness journeys to improve overall physical and mental health. Programs are sponsored by the Damascus Senior Center Sponsors, Inc.

An example of a co-location strategy in progress:

- The Wheaton branch library will co-locate with the County Recreation Department on property currently in use by the Library Department. Current plans are to build a new facility that will house the Wheaton Library, Wheaton Recreation Center, and book sale space for the Friends of the Library, Montgomery County, Inc.

Montgomery County Public Libraries

Where the County Reads, Where the County Meets, Where the County Learns

FY13 – FY16

Technology Plan through Projects

It is change, continuing change, inevitable change, that is the dominant factor in society today. No sensible decision can be made any longer without taking into account not only the world as it is, but the world as it will be. Isaac Asimov

Introduction

There are no scrolls in Montgomery County Public Libraries. There are no woodcuts. There are probably very few books even printed with movable type -- computers took over publishing long ago.

Yet the mission of libraries remains the same as it has through the ages -- to help people find information and other materials valuable to their lives. What has changed, and what will continue to change, is that libraries keep pace with the way in which customers find, and use, the materials important to them. Once upon a time, it was only in printed books. Now, books are being augmented in the rest of society by a digital revolution that combines words and images in devices that are gaining more acceptance each day.

Once upon a time, card catalogs were the way customers found what they were looking for in the collection. Now, models have shifted to hosting that information online. Customers no longer simply want to find books or other materials -- they want to share their thoughts on it with others, and keep lists of books or music or film for future reading, listening and watching. That is how the rest of society works; libraries have to keep up or risk being left behind.

Once upon a time, newspapers and magazines were the way customers found out what was going on in the rest of the world. Now, library Internet access is a crucial part of what is offered to the public, not only for research, but to help look for work, to start businesses, to learn new languages, etc.

The Montgomery County Public Library System has started that transition well.

The focus of Public Libraries is still books, but more and more time and resources are going into identifying, purchasing and providing digital information. The reference collection at Montgomery County Public Libraries (MCPL) is composed largely of online databases available to users 24/7. E-book circulation is showing double digit increases in the percentage of circulation.

MCPL is providing more electronic resources for research and e-books, and has responded to these changes by developing a presence on Facebook and Twitter. Information questions are answered via online chat as well as email. The Library's catalog is available via an application for iPhones and iPads.

Our computers also provide an assortment of software tools that many customers could not otherwise afford to buy for themselves. Library staff and user instruction sessions are available to help customers learn new hardware and software technology. In addition to computers, libraries have become a key source of Internet connectivity, providing users with great diversity of uses, including business, education, and socialization.

Surveys have shown that our customers are very satisfied with our libraries (96 percent satisfaction rate), but less so with some of the technology aspects, including the Library's website, and help in using technology. Those who completed the follow-up survey were very clear in their desire for two things --a mobile application for the Library's catalog and website, and more e-books. The great majority of those who asked the staff for assistance were satisfied, but there were a number of comments to the effect that branch staff was unable to help them with their technological problems, especially downloading e-books.

In this report, Montgomery County Public Libraries presents nine projects for your consideration for FY13-FY16.

The projects are:

- ▲ Enhanced Catalog Application Project (eCAP)
- ▲ Integrated Library System Evaluation Project (ILSEP)
- ▲ Kiosk Library Projects: Beyond Library Walls (KLiP)
- ▲ Radio Frequency Identification (RFID) Project
- ▲ Restoring and Enhancing Vital Information Technology Assets in Libraries (REVITALize)
- ▲ Revitalize Obsolete Customer Information Technology Tools (ROckit)
- ▲ Smart Room Technology (SmaRT)
- ▲ Web Enhancement Project (WEP)
- ▲ Digital Media Lab (DML)

These projects are designed to meet the demands of today while building for the technological demands of the future. They range from upgrades of basic infrastructure, to improvements in the catalog, to providing communities without full library services access to materials they need.

The projects are presented so that the need for each is outlined; the benefits of proceeding with each project is set out; and the costs are identifiable.

2013-2016 Technology Projects

A list of technology projects that would improve current library services or add new services was generated based on the results of exhaustive research, input from library and technology experts and library customer surveys. Included are the findings and recommendations from: two major Montgomery County Public Libraries' customer surveys; library staff; local and national stakeholders' opinions; recommendations from County Executive Leggett's "Summit on the Future of Libraries;" and a Summit and Futures Planning Committee, which included representatives from the Library Board and the Friends of the Library. The list was evaluated and prioritized by the Library Director's Advisory Committee and the Library Board. The results comprise the technology projects to implement during the next four years of the Library's Strategic Plan.

The Technology Projects for 2013-2016 meet some or all of the following criteria:

1. The project addresses a current need identified by Library stakeholders.
2. The project prepares the Library to meet an anticipated need, reflected by current technology and/or library use trends.
3. The project promises to increase efficiency and allow Library staff to focus on high-value public services.
4. The project provides a means by which the Library can support County and community initiatives.
5. The project receives strong support from Library customers and/or staff.
6. Technology projects suggested by Library staff during the 2011 Staff Development and Training Day: "One System Planning Ahead."

Some technology projects listed will be ongoing and will extend beyond the four-year plan.

Cost and time estimates for projects are included in the project descriptions. Where specific products are specified, they are intended as examples of a product that would fulfill the Library's need. Costs should be considered to be approximate.

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1. Enhanced Catalog Applications Project (eCAP)

The library catalog is the primary tool used by customers in identifying if the Library system has materials that meet their needs. It is a comprehensive listing of all library materials with information about their status, type, location and other relevant information. It is accessed via computers either in the library or remotely from any Internet-enabled computer or device.

Customer satisfaction surveys and staff input reports have documented overall dissatisfaction with the current catalog interface. The lack of enhanced search capabilities, customer personalization and customer content are cited by customers as barriers to connecting to MCPL's collections via the catalog. Customers have also conveyed that the current library catalog interface is far less functional than the search interfaces used to complete similar tasks in a retail setting (e.g. Amazon.com, Barnesandnoble.com).

Benefits

The catalog interface enhancements in this project will improve the effectiveness of the library catalog in meeting the needs of customers and connecting them to Library resources. Enhanced search capabilities will produce effective search results that are more relevant to the customers' needs. Customers expect to be able to sort search results by popularity and rating and to see search suggestions; they will have the ability to achieve this with new applications. These are all features that are ubiquitous in modern retail settings, and which aid customers in quickly making effective decisions.

The new applications will allow customers to add their comments about the Library's collections through social networking. Customers will also have the ability to save searches and booklists, share content with other customers and contribute content (book ratings, book reviews, booklists, and discussion forums).

eCAP will remove barriers to quickly and efficiently connect customers to the Library's collection and make the library a stronger physical and virtual extension of online social networks.

Estimated Cost and Staff Time

Cost estimates for the project range from \$25,000 to \$85,000 per year for the software needed to improve the catalog function. The project requires substantial staff time from those in Technology, Administration and Information services.

Selecting an appropriate technology is estimated to take an additional three to six months beyond current efforts. Implementing the project would take two to six months following a notice-to-proceed to an applicable vendor.

2. Integrated Library System Evaluation Project (ILSEP)

The Integrated Library System (ILS) is a major component of the customer services MCPL provides. It is the engine that powers the department's operating infrastructure. It allows customers to find materials, place holds on items, manage their accounts, check-out and renew materials, and receive status communications, among many other functions. It is the tool that allows library staff to inventory library materials, check-in/check-out materials, process and catalog materials, manage acquisition of new materials, manage hold requests, access critical statistical and operating reports, evaluate performance, make operational decisions, administer fees and fines, and other functions critical to daily library operations.

The current ILS is an upgraded version of the system in use by MCPL since 1999. The system received a hardware upgrade in 2006 and a major software version upgrade in 2010. While the system is currently functional, deficiencies or risks could arise because of the aging of the current infrastructure, or because of changes in customer demands, the library technology market or County technology changes. During the plan's term, the current hardware plant (now six years old) and contract (now twelve years old), will both reach the end of their feasible lifecycles.

Benefits

Due to the complex nature of the technology and its importance to all aspects of library services, MCPL must evaluate the condition of the system; identify any deficiencies, risks, or needs for improvement; and recommend the most appropriate actions, including modernization or possible total replacement. Benefits of the ILS evaluation include ensuring the best match between the changing needs of library customers and the current capabilities of the technology market. The evaluation process will include gathering feedback from both internal and external stakeholders, and will likely include assistance from a neutral facilitator.

A careful, structured review of the ILS during the planning period will ensure the existing system infrastructure remains stable and functional, and will be designed to provide feedback on potential future needs in a timely fashion. A modern library system, particularly one of MCPL's size and complexity, can only perform effectively with the use of a high-performance ILS.

Estimated Cost and Staff Time

The primary costs of ISLEP would be funds for facilitating the formal feedback of staff and customers concerning the functionality of the current system (\$5,000 - \$10,000) and possibly technical consulting on specific aspects of the system's performance or on developments in the relevant technology market (\$5,000 - \$10,000).

The project will take approximately a total of one work year. Key staff will spend time setting up evaluation parameters, processes, and implementing the evaluation.

The evaluation project should kick-off in early spring 2012 and conclude mid-fall 2012, in time to provide input on potential costs for the FY2014 Operating Budget submission process.

3. Kiosk Library Projects: Beyond Library Walls (KLIP)

Many residents of Montgomery County do not have easy access to library materials and services due to a number of reasons including: their library branch is undergoing renovations; they live in remote areas of the County without a library nearby; or, they live in an area of the County where a full-service library branch is not needed or feasible, but where a lesser level of library services would benefit the community.

Benefits

MCPL will offer customers services beyond the library's walls through kiosks. When a brick and mortar structure is not available to customers, a kiosk is the model MCPL will utilize to deliver books, materials and services. Kiosks are typically small structures with one or more open sides that are used to vend merchandise or services. Their use is widespread: retail malls, photo developing, healthcare, ticketing, travel and more. Kiosks are produced for minimal cost compared to the cost of a dedicated building. The kiosk can be a permanent structure or a temporary one. The kiosks provide a range of materials and services to customers including: current books for children and adults in a book vending machine, a drop-off for library materials, customer books/materials on hold in a materials locker system, and media (DVDs) in a media vending machine.

The Library's strategic view of the role of library kiosks in Montgomery County will allow customers from all areas of the County to connect to library collections and to consider the library an important virtual and physical resource for their information needs. Utilizing the KLIP model, MCPL will:

- Provide services to customers when branches are under renovation;
- Establish services in remote areas without library services;
- Locate services in busy, high-traffic retail areas;
- Locate services at Metro and bus stops;
- Place in locations where a new library may be built; and,
- Target areas where a full-service library branch is not needed or feasible, but where a lesser level of library services benefits the community.

MCPL has several branch renovations scheduled over the next five years, and temporary kiosks will be important assets during construction. A kiosk branch can provide services (books and materials) and access to virtual services for minimal cost compared to a dedicated library building. Kiosks benefit customers who cannot afford to travel to another library branch. Customers will be able to access library materials outside of library hours, and items can be returned conveniently without making a trip to a library further away. The placement of these kiosks in busy, high-traffic areas will also attract new library users and are a good marketing tool for many library services.

Estimated Cost and Staff Time

Kiosk estimates range from \$50,000 (for a limited provision of materials and a drop-off bin) to \$150,000 (for media, materials, and holds fulfillment) with carrying costs approximately 20-30% of acquisitions costs. Training on the use of kiosks will be required of Delivery and Collection Management staff. Staff time will include the selection of materials and the delivery and pick up of materials.

4. Radio Frequency Identification (RFID) Project

The Library needs better security and inventory control for library materials and a more reliable check-in and check-out system that also provides efficiencies for customers and staff. Securing over 2.5 million library materials, creating and managing the inventory, checking the materials out to customers, and checking them back into the library branch are core activities of library operations. Barcode systems are currently used by MCPL to perform these core functions, but are inefficient, outdated and do not perform with the accuracy and speed necessary for check-outs, materials security and inventory control. New technology that helps reduce staff workload while increasing productivity and improving efficiency is a cornerstone of the 21st century library.

Benefits

Radio Frequency Identification is a technology that uses radio waves to transfer data from an electronic tag (attached to an object) to a reader for the purpose of identifying and tracking the object. RFID tags can be used in many applications to track and manage inventory, assets, books and materials. It is a superior and more efficient way of securing library materials than the barcode systems that have been in place at MCPL since the 1970s. It can improve the reliability of check-in and check-out, reducing the number of inaccuracies on customer accounts. Improvements in read-range and speed have made RFID-enabled book drops a practical investment by automatically checking in materials immediately when a customer returns them and before more time is spent sorting them. With check-in and check-out processes more efficient, materials get into the hands of customers sooner.

Staff time will be more focused on customer needs rather than spent with check-ins, lost items, customer account inaccuracies, and tracking materials.

The RFID interaction with security systems and inventory systems will improve retention of the Library's investment in materials and will enable customers to find the materials they want.

Estimated Cost and Staff Time

Costs for the project vary by the proportion of the sites covered. Current costs would include the tagging of each item (costs for tags are approximately \$0.25 - \$0.75 per unit), applying tags, security gates (typically \$10,000 - \$100,000 invested per site, depending on the number of circulation workstations and entry/exit points), and "barcode conversion" devices. A whole-system implementation would range between \$1,000,000 and \$3,000,000 depending on the proportion of the collection tagged for both circulation/inventory and security purposes.

All circulation staff and selected information staff will be trained in the use of RFID technology and a project manager named from existing staff.

5. Restoring and Enhancing Vital Information Technology Assets in Libraries (REVITALize)

As the Library system continues its role as a community destination with a sense of “place,” the role of technology is vital for both customers and staff. New options for efficient service delivery and new service models based on technological developments must be implemented. MCPL must ensure the “place” customers choose to visit to read, meet and learn is equipped with the tools, techniques and technologies that are important to them. This infrastructure which serves millions of customers per year, thousands per day is composed of the computer network, business computing, point-of-sale, communications, and mobile services equipment used by Library system staff to support Customer Information Technology Tools and conduct daily business. As infrastructure ages, much staff productivity is lost to slower response times on computers, system crashes, and inefficient business processes as limited by the aging infrastructure. Customers are also impacted, both in the convenience of their daily transactions and in being able to effectively use the library infrastructure like WiFi networks to support their business, education, job search, and other important activities.

Benefits

The Library system needs a vital, up-to-date, highly functional information technology infrastructure to serve customers in an efficient and highly effective manner. REVITALize will increase staff efficiency, accuracy of financial transactions, and system effectiveness. It will make it easier for customers to pay fines and otherwise manage their accounts. It will enhance customers’ abilities to conduct e-Government transactions, search for jobs, complete educational requirements, learn new skills, and support their personal and business endeavors.

Estimated Cost and Staff Time

Estimates for some of the specific issues include:

1. Payment and account technology: Costs per branch would be a few thousand dollars (for credit card intake/cash register modification, and secure network installation) with potential additional “revenue costs” (credit card fees). It is possible, however, that such technology would boost revenues by making payments more convenient for customers.
2. Self-service infrastructure: Better self-checkout technology would cost approximately \$3,000 per existing machine (38) and \$10,000 - \$15,000 per new machine, plus increased operating costs for self-checkout machines that can accept credit card payments for library fines. Self-payment kiosks (where customers could pay for fines and for print/copy accounts with credit cards): One-time costs were estimated at \$150,000, with carrying costs in the range of \$50,000 - \$75,000 per year. A minimum of two work years total investment by at least four staff in Central Administration (two Business Office, two Technology Management/Operations), plus substantial training time and policy creation.
3. Network Infrastructure: A WiFi upgrade is estimated to cost \$20,000 - \$50,000. The lower cost point would upgrade only the access points, expanding the number of concurrent sessions and network speeds. Higher costs would be associated with a system that could more actively manage WiFi usage and provide diagnostic and management reports. Network upgrades (switches, new wiring at select locations) is estimated to be approximately \$100,000 - \$150,000.
4. Staff equipment and communications: In-building, staff-to-staff communications for larger buildings is estimated at \$25,000 per building. Other equipment, such as portable computers, would vary by the type of equipment selected and its deployment.

6. Revitalize Obsolete Customer Information Technology Tools (ROCKIT)

Today, Customer Information Technology Tools have become a major library service, and similar to library materials, the Library system must provide more relevant, functional and timely upgrading of these tools. National research has shown that these tools are especially important to customers impacted by the recent Great Recession, which a national survey by the Online Computer Library Center estimated to be 20% of the population. Library's Customer Satisfaction Survey results (2008, 2010 and 2011), customer correspondence, and staff feedback support these findings. Customer Information Technology Tools include public Internet access and library catalog computers, software, labs, and printing/copying devices. Customers use these tools to find jobs; build career skills, complete educational requirements; conduct e-Government business with other County departments and other government agencies; learn reading and math skills; do personal research to make important life decisions; interact with their community; and grow their small businesses; among many other diverse and vital activities.

A majority of the Customer Information Technology Tools in Libraries are now obsolete or insufficient to meet the full diversity of customer needs. When customers have to use obsolete tools, the documents they create or try to view on library computers are frequently incompatible, making them hard or impossible to use. The tools currently being used by the Library system evolved over a long period of time in the form of individual grant funded and County funded one-time initiatives. A long-term, permanent, and sufficient funding and operations infrastructure is needed to consistently keep all the tools in the best working order and at levels of capability appropriate to current customer needs.

Many public computers in the inventory are now approaching five years old, are under heavy use, and use an operating system that is three versions back from current technology. The office productivity software suite in use by the system is from 2002, several versions behind tools currently needed by customers and in use by most workplaces. MCPL must provide customers with more functional and relevant Customer Information Technology Tools. These tools must keep pace with current customer needs and must be maintained and upgraded in a proactive manner that will better meet future demands.

Benefits

Up-to-date and sufficient tools will enable MCPL to use current versions of Internet browsers, office productivity software, email, and other software needed by customers to effectively search for jobs, to complete school assignments, create resumes or other documents, locate and print Federal and County government information, and stay connected to their communities via technology. Using current versions of common business and educational software will make customers more competitive and effective in finding jobs, improving their careers, and educating themselves. ROCKIT solutions include:

1. Adequate access to state-of-the-art computers that are fast and effective, no more than three years old, and are consistently and conveniently available. This will be done in coordination with the Department of Technology Services.
2. Enhanced management systems for customer computing, Internet time, printing and other functions.
3. Adequate software for customer use.
4. Functional, efficient, and effective placement of these resources in library branches, labs, and mobile vehicle(s) to serve customers beyond library walls.

Estimated Cost and Staff Time

Rough estimates for some of the specific issues include:

1. Office productivity (\$125,000 - \$350,000): An assessment would be conducted of Cloud-based software versus the traditional owned per device model. Lower costs are for a Cloud-based model and the higher costs would be for traditional per computer purchase.
2. Lifecycle replacement of 500 public access computers on a three year cycle, versus a five-year cycle, would be approximately \$80,000 per year, assuming a computer cost of \$1,200 per unit.
3. Enhancement of customer printing/copying/scanning/faxing capacity: The current system only supports printing and copying. Upgrading to a more flexible infrastructure could cost an additional \$75,000 above current levels. The Library would spend approximately \$225,000 per year for infrastructure, but claim only \$150,000 in revenue from copy/print sales.
4. Expanding the types of software available on computers would vary by the software selected and the computers to be upgraded. If we increased the software investment by \$500 per computer, the approximate cost would be \$250,000 in initial investment.
5. Depending on the capabilities of the mobile lab, creating a mobile computer lab capability would range between \$50,000 and \$250,000.

7: Smart Room Technology Project [SmaRT]

The Library's 2008 and 2011 Customer Satisfaction Surveys suggested the Library provide the technology and equipment in library meeting rooms for videoconferencing, interactive learning experiences and multimedia presentations. Libraries are not only a destination for materials and books, but also a meeting place to create, share, and learn. Library meeting rooms are in great demand in Montgomery County, and with the appropriate technology, meeting rooms would have the ability to expand and be of greater use to more residents. At this time, the Library computer labs and community meeting rooms provide limited equipment for meeting applications.

Smart Rooms are specific rooms in buildings that are equipped with a full range of technological products that support instruction, lectures, demonstrations, and various types of programs.

Benefits

Input from the Library's Customer Satisfaction Surveys has indicated a need for Smart Room technology to widen the scope of possibilities for learning and entertainment in meeting rooms. Smart Room technology and videoconferencing equipment would support attendance at meetings with groups across the County, the state, and the nation; afford numerous civic engagement opportunities for residents; provide better accessibility to County public forums; reach wider audiences for training opportunities; and expand opportunities for cultural and educational experiences.

Libraries, as a meeting place for structured and informal gatherings, have been invaluable to customers' and communities' need for meeting spaces. A library meeting room with media and learning tools expands the use of meeting rooms and provides more opportunities for learning and enjoyment. A videoconferencing room in the library for use by the County would be an investment that could benefit many communities, business and educational groups who would want to host or attend professional conferences, provide lectures for wider audiences or attend a lecture given across the country.

Estimated Cost and Staff Time

Estimates for SmaRT range from \$5,000 to \$25,000 depending on how many components are added. Vendor assistance will be required.

8. Website Enhancement Project (WEP)

Library customers want the same services, and more than those delivered inside the library building, accessible to them via MCPL's 24/7 website. At over 5 million visits per year, Library's website is one of the most visited in the County. In order to serve the very diverse County audience, the Library's website must provide excellent navigation, well-designed categories of information, and be compliant with the Americans with Disabilities Act (ADA). Improvements must be made to the overall look and feel of the Library website in order to maintain a consistent branding, improve navigation and usability, and support demand for on-going web innovation

Benefits

WEP will ensure a complete review and potential structural design change of MCPL's website in order to make it Section 508 (ADA) compatible. In addition, it will brand Library's core mission and services; provide information and reference services via online tools; and enhance social networking tools, the ability to embed tutorials, and ongoing customer feedback and evaluation of website and library resources.

Estimated Cost and Staff Time

The scope of this project will be more defined after the department completes the refresh website project under the management of the Department of Technology Services. The refresh website project will provide basic web architecture for Library's website. The completion of this phase is expected in spring 2012. MCPL has applied for a grant to hire a consultant who will then act as a guide in designing a website that is easy to navigate, maintains a consistent brand and supports the demands for ongoing web innovation.

Funds will also be needed for software licensing; hardware; and training to acquire skills in maintaining the website, creation of tutorials, publishing on YouTube, Facebook and other video-sharing sites.

9. Digital Media Lab (DML)

While literacy is still a vital role in the Library's mission, it is not enough simply to be literate. The American worker of the future must be technically literate and able to create content effectively with modern media technology. Library spaces have become increasingly important as gathering places where people meet to collaborate on shared school or community work, be a part of the community, learn independently, use social networking technology, express themselves, and access media technology tools that they could not otherwise afford to use in order to support these endeavors. Media Labs are relevant for all ages; this plan will focus on teenagers. The library has become a very important space for these tools for youth, and particularly at-risk youth. MCPL does not have a youth media lab, which is a key tool in supporting these emerging needs.

Benefits

Establishing Youth Media Labs will engage middle- and high-school aged youth in mentor-led, interest-based, collaborative learning using digital media tools such as video, photo, audio, and music equipment, coupled with computers, tripods, disk drives, and other computer equipment that support the creation of digital content. Youth will be exposed to a variety of digital technologies, which will help them develop critical thinking skills, creative expression abilities, and the ability to effectively use modern media equipment. This interactive space will support learning experiences which give teens an avenue to pursue their individual interests and have a forum to discuss issues of importance to their community. This project will facilitate partnerships with other County departments and agencies that are also serving youth with technology, and potentially with area non-profit groups and other organizations. The lab will support STEM (Science, Technology, Engineering, and Mathematics) and arts learning, and help to ensure that our young people attain critical thinking, problem solving, communication, and collaboration skills that they need to be competitive in tomorrow's workforce.

Estimated Cost and Staff Time

The department estimates that a single Youth Media Lab would cost between \$150,000 - \$200,000 in the first year, depending on the level of physical modification required to the space housing the lab. Costs are comprised of approximately \$50,000 in initial acquisition costs for computers, equipment, travel, research, and supplies and approximately \$102,000 in staffing costs for program management, planning, implementation, and conducting the lab program. Work effort is estimated at approximately 1.3 full-time equivalents per year. Staffing costs would continue annually, and operating costs would be less (about \$10,000 per year), with periodic re-investments in the core lab technology.

Conclusion

The Library system must operate both as a governmental department and a retail-style business. In addition to customer needs for technology in the provision of information services, library customers expect and demand that the Library system operate with the same level of efficiency, convenience, and effectiveness that they experience in the retail sector. This means modern payment technologies, self-service technologies, up-to-date web page technologies, efficient information searching technology, and convenient account management technology. The current library system technology infrastructure in this regard is very basic. This plan will move us in the right direction.

Montgomery County Public Libraries

Where the County Reads, Where the County Meets, Where the County Learns

FY13 – FY16

Marketing Plan

Executive Summary

It is essential that Montgomery County Public Libraries (MCPL) market its services and resources to effectively bring attention to our libraries, the services we offer and demonstrate our value to the community, our stakeholders, our financial supporters and the public. Marketing is a proactive function.

The MCPL Marketing Plan for FY13 – FY16, known as “The Plan” is intended to strengthen the Libraries’ image, increase library use by our residents, drive traffic to our website and place us above our competitors to demonstrate return on investment to our financial supporters. The Plan will help MCPL develop and execute strategies that communicate our mission and demonstrate the vital role we play within the community.

MCPL’s FY13 – FY16 Strategic Goal for Marketing is to “*Empower our Communities by Creating Awareness of Libraries’ Resources.*” The Plan’s strategic objectives are:

- Help each community reach its cultural awareness through collections, displays and programming.
- Continue to strengthen the Libraries’ outreach to the Senior and people with disabilities communities.
- Communicate the roles of Libraries to the communities.
- Implement the four objectives of the Libraries’ Marketing Plan.
- Implement the Libraries’ Outreach Program to the communities.

Results from the 2008 and 2011 Customer Satisfaction Surveys indicate that a percentage of our current library users are unaware of the programs, services and resources the Libraries offers. In addition, staff feedback gathered from the 2011 Staff Development and Training Day indicates marketing and publicity are important concerns for the staff of Libraries.

The strategic marketing activities identified as a priority include:

1. Improve the Libraries’ website so that the public can see what Libraries offer.
2. Use the website to highlight services and programs.
3. Promote our brand with sponsored advertising.
4. Conduct outreach by demographics to specific populations such as teens, Seniors and New Americans.
5. Collaborate with community organizations.
6. Conduct shared marketing with other County departments.
7. Have staff be proactive in marketing Libraries’ programs and services.
8. Increase awareness of services via local businesses, advertising and displays.
9. Collaborate with schools to promote our services and programs.

These nine strategic activities will guide the Plan to meet our customers needs and demonstrate MCPL’s commitment to the communities it serves. Targeted marketing of specific services and resources through awareness campaigns and participation in community outreach events will help raise the public’s knowledge of Libraries’ services, programs and materials available to them.

Introduction

The FY13 – FY16 Marketing Plan presents a fresh opportunity to increase the Libraries' visibility and create interest in using the libraries. The Plan provides a consistent means of ongoing communication between Libraries, the staff, and the public. To accomplish this, the nine strategic activities are grouped into four categories:

Refresh MCPL's website

- Improve the Libraries' website so that the public can see what Libraries offers.
- Use the website to highlight services and programs.

Revitalize MCPL's Outreach Program

- Promote our brand with sponsored advertising.
- Increase awareness of services via local businesses, advertising and displays.
- Conduct outreach by demographics to specific populations such as teens, Seniors and New Americans.

Renew MCPL's Collaboration opportunities

- Collaborate with community organizations.
- Conduct shared marketing with other County departments.
- Collaborate with schools to promote our services and programs.

Rededicate MCPL's marketing of Libraries' programs and services.

- Implement staff's use of social media tools such as Facebook and Twitter, in compliance with the County's and department's Social Media standards.
- Use the revised Graphic Standards for flyers and branch advertising.
- Use Plain Language in all areas of MCPL's marketing.

1. Refresh MCPL's Website

As part of Montgomery County Government, MCPL complies with the County's Web Refresh Project to enhance resident's access to County services and improve ADA compliance. MCPL is in the process of reviewing all of the Libraries' pages to make the programs and services offered visible to the customer. In the short term, MCPL's website will display a combination of the current and proposed website pages. By the end of FY13, MCPL's website will be on the County's new servers and the web refresh will be complete.

As MCPL moves into the FY13 – FY16 Strategic Plan, the Plan includes regular website review and maintenance to retain only the most current and accurate information about Libraries' programs and services. MCPL will continue to utilize LibGuides as a method of information sharing with the customer. MCPL will continue to offer Reader's Café; Kidsite and Teensite. As the demographics of the branch communities are defined, MCPL's website will include new and/or updated information to meet the needs and interests of the County.

Programming is a core service of MCPL. MCPL will maintain an appropriate calendar of events so that customers can locate programs of interest as well as programs in convenient locations.

MCPL will implement and use the concepts of Plain Language in order to effectively communicate services and programs to its customers.

2. Revitalize MCPL's Outreach Program

As MCPL implements the FY13 – FY16 Strategic Plan, one major theme is to continue to reach beyond the libraries' walls in order to promote the services and programs of Libraries to current and new communities. To do that successfully, MCPL must identify its target audiences.

One source of information is the current 2012 Census Data. MCPL will use the current census data to identify the target audience(s) using the following characteristics: age, income, life stage, buying habits, location within a branch community, etc. For example, when crafting the key message for a particular campaign, MCPL will determine the benefits to the target audience. The campaign's emphasis will focus on what the target audience will gain by using the service or program offered by MCPL. How MCPL identifies its target audience and what services to market to that audience is dependent upon how many people are in that demographic identifier and currently use the services and resources. An effective marketing campaign or activity will use the following evaluation criteria:

- Clear and measurable goals
- Define and track key performance indicators
- Evaluate pre- and post-campaign results
- Calculate the marketing ROI (Return on Investment)

A marketing campaign is an investment of time, human resources and money. Measuring the return on investment is important in order to decide whether to retain, stop, or update the specific marketing effort.

Staffing levels specific to implementing the Outreach Program are necessary to reach beyond the libraries' walls and let new communities, such as teens, Seniors, and New Americans know about the services and programs available to them.

3. Renew MCPL's Collaboration Opportunities

MCPL will renew previously established partnerships in order to conduct shared marketing efforts with other County departments that share similar target audiences. One such collaborative effort is MCPL's participation in the Homeless Resource Day sponsored by the Department of Health and Human Services.

MCPL will revisit and renew its collaborative efforts with the City of Rockville, as an example, to coordinate activities that promote the Town Center merchants and Libraries' services and programs.

MCPL will collaborate with Montgomery County Public Schools (MCPS) to promote our services and programs that communicate our role in early literacy and school curriculum. For example, MCPL will also work with MCPS to determine if there are any databases that duplicate services.

4. Rededicate MCPL's Marketing of Programs and Services

Libraries' services such as events, programming, collections, and access to information are the tangible goods that have value and benefit to our customers. MCPL's entire staff shares in the marketing of Libraries' services to our customers in a variety of ways. MCPL's Plan takes into account all of the various methods of communicating Libraries' services and benefits to the customer, including the use of the revised Graphic Standards and Plain Language for flyers; and the use of Plain Language on the Libraries' website and use of social media.

Libraries' operations and the delivery of information and services will change as technology changes; and so will our marketing strategies. Information access has shifted. More people are using mobile technology to receive and send information. It is important that the Plan consider new methods of marketing to reach all users such as blogs, Wiki's, gaming, RSS feeds, photo sharing, and social book-marking. It is also important that staff utilize Twitter and Facebook in program marketing campaigns.

For each marketing campaign or event, the Marketing Committee will determine the means of promotion best suited to the service, product or concept being promoted or is most suitable for the target audience. The Committee will use information from the Customer Satisfaction surveys to determine what drives our users and what the customer consider important. The marketing promotions will tie into the needs, preferences, and decision-making practices of our users as well Libraries' initiatives and input/feedback from staff. The Plan will also:

- Provide a mechanism for staff to give input and feedback.
- Use a variety of media and technology to reach traditional users and non-traditional users such as Generations X and Y.
- Demonstrate to the public the relevance of libraries in their everyday lives, as a result, increase use.
- Ensure that MCPL has a positive presence in the professional and news media community.
- Promote the use of established Graphic Standards throughout the system so that all promotional materials have a professional, standardized look that is identified with MCPL.
- Provide the concepts, materials and strategies to help staff actively promote Libraries' services to the public.
- Ensure that all staff deliver the same message with the same level of importance.
- Ensure that staff are knowledgeable about Libraries' services and resources and communicate this knowledge to customers.

The purpose of the Graphic Standards is to standardize all documents created by MCPL, maintain a consistent high quality product, reinforce MCPL visibility and strengthen its identity and role in the community. The MCPL Graphic Standards apply to all documents created for public use by staff at MCPL branches and Central Administration. See Appendix B for the complete Graphic Standards Manual.

It is recommended that the Friends of the Library, Montgomery County, Inc., local Friends chapters and Library Advisory Committees follow the procedures outlined in the MCPL Graphic Standards Manual.

The Graphic Standards in the FY13-FY16 Marketing Plan replace the previous Graphic Standards Manual. These Graphic Standards will be evaluated on an annual basis to insure they continue to meet the strategic goals.

Plain Language removes barriers to understanding, improves customer compliance and reduces the need to explain. It is communication that is direct, organized in a logical way, concise and easily understood.

MCPL will implement its Strategic Marketing Plan using the principles of plain language communication. The effectiveness of MCPL marketing campaigns will be measured and evaluated on the use of Plain Language in its marketing strategies. See Appendix C for the Plain Language Manual.

MCPL's Marketing Committee will utilize the Analysis of Strengths/Weaknesses/Opportunities/Threats (S.W.O.T.) process as a method to evaluate the Libraries' S.W.O.T. internal strengths and weaknesses as well as any external opportunities or threats that impact business operations. See Appendix D for a listing of MCPL's strengths, weaknesses, opportunities, and threats.

MCPL will use the following strategies and tactics to reach current and new customers:

- Public Service Announcements (PSAs)
- Bus Placards
- Newspaper Advertising (print and online)
- Social Media – Facebook, Twitter, Blogs
- Libraries' Website
- Articles in local/community newsletters (print and online)
- Articles in professional publications such as Library Hotline and Maryland CRAB
- Flyers and Publications
- Promotional Campaigns
- Community Partnerships
- Participation in Outreach Opportunities
- Quick Response (QR) Codes
- Signage

Implementing the Strategic Marketing Plan as MCPL begins to re-build its infrastructure will allow MCPL to reach new audiences, increase its brand with current and new customers and help MCPL develop and execute strategies that communicate our mission and demonstrate the vital role we play within the community.