

Special Library Group 1: The Fran Kaylin Library 2014-2016
Strategic Plan to Create a Digital Collection

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This strategic plan is loosely based on museum libraries in the cities of Portland, Oregon and Pasadena, California. However, the vast majority of specific information is entirely fictional.

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Abstract

This 2014-2016 strategic plan outlines the necessary steps to create and implement a digital collection for the Fran Kaylin Library of the Pasadena History Museum. Beginning with a review of the library's mission, vision, and values, the plan analyzes organizational resources, stakeholder and user needs, as well as strengths, weaknesses, opportunities, and threats. The resulting strategic initiatives will enable the library to meet its goal of providing an accessible digital collection online. Additionally, operational initiatives address current services as well as the needs and desires of a growing and diversifying user base. Ultimately, the plan is intended to enable the library to expand its mission beyond the library walls to share its unique resources and enrich the lives, livelihoods, and educational goals of the global community.

Keywords: library strategic plan, museum library, digital collection, online catalog, globally accessible collection, environmental scan, SWOT, needs assessment, goals, objectives

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The Fran Kaylin Library 2014-2016 Strategic Plan to Create a Digital Collection

Introduction

The Fran Kaylin Library is an integral part of the Pasadena History Museum, a private nonprofit, community-funded cultural heritage institution. The museum building and grounds were a gift of the Covell family, a prominent and respected local family, in 1924. Since the museum's founding, the library has grown predominantly through gifts from the people of the region including books, magazines, diaries, and other personal documents and ephemera. The library provides access to analog collections of these primary and secondary source materials for local, national, and international researchers. The library also supports the museum's educational programs for local adults and children.

The following strategic plan covers 2014-2016, and outlines the goals, objectives, and activities in support of the creation of a digital collection for the Fran Kaylin Library.

Mission statement

It is the responsibility of the Fran Kaylin Library to execute services and programs in support of the Pasadena History Museum and the Covell Foundation that established it. The mission of the Fran Kaylin Library is to preserve and share the cultural heritage of the city of Pasadena to enrich the lives, livelihoods, and educational goals of its citizens¹.

Vision statement

Our vision is to be a model for cultural institutions nationwide by:

- Providing an accessible, inviting facility that welcomes people of all ages and walks of life, and enhances a feeling of community.
- Providing engaged, knowledgeable staff, and volunteers committed to serving patrons' wide-ranging needs and interests.
- Enabling adults to gain a new appreciation for the people and events that made the city what it is today so they are motivated to contribute to its bright future.
- Developing opportunities for research through primary and secondary sources, innovative programs, and state-of-the-art technology.
- Creating enjoyable activities to teach children about the history of their city and inspire them to pursue historical studies.
- Partnering with like-minded institutions to cultivate enriching programs and events.

¹ The mission statement is purposefully "broad" and "inspiring" and is complemented by specific, practical services and programs tuned to its audiences' needs (Rangan, 2004, cited in Evans and Layzell Ward, 2007, p. 150).

Values

The staff and volunteers of the Fran Kaylin Library strive to provide friendly, comprehensive service to all patrons whether they are children, professional researchers, or historically minded members of our community. We want all who visit the library to feel welcome and to leave with the information they desired as well as a greater understanding of Pasadena history. We listen to our visitors and work to meet their needs by adopting innovative programs and technologies while remaining fiscally responsible. We value the trust of our foundation, visitors, and donating members, and work to fulfill our mission with professionalism. These values are based in part on the Code of Ethics of the American Library Association (American Library Association [ALA]) and the Code of Ethics of the American Alliance of Museums (American Alliance of Museums [AAM]).

Management style(s) and leadership issues

The library management team works very closely with the Museum Director as well as the Curator, Marketing Manager, Facility Manager, and Volunteer Coordinator. With such a small permanent staff, collaboration is the key to our success. Our Director is a dedicated, experienced leader who inspires and encourages our managers, volunteers, and visitors alike. She is politically savvy and engages with local government as well as other public institutions like the Pasadena Public Library to form beneficial relationships and partnerships.

We consider our volunteers to be important members of our team, and spend sufficient time on education and training so that they may confidently complete their assignments.

We strive to respect the needs of library visitors, whether they are researchers with limited time, eager and excited children, or simply members of the public who want to spend an afternoon in the archives.

Management team members

The library's management team is composed of a Librarian, Archivist, and Educational/Event Manager. With the help of local volunteers, this small though nimble team manages the day-to-day research activities of the library and plans educational events for adults and children. In addition, the management team stays abreast of the latest program innovations and technologies, and works to prioritize its initiatives to meet the needs of in-person and online visitors.

Stakeholder Groups

Internal Stakeholders

The employees and volunteers of the Pasadena History Museum are all considered internal stakeholders whose opinions as to the purpose and performance of the library are valued.

- The Museum Director has overall accountability for the museum, including the library.
- A peer to the library management team members, the Curator is supported by the library in collection and exhibit development.
- The Marketing Manager is also a peer with whom the library management team works to promote the museum and library.

- The Facility Manager is a key logistics partner.
- The Volunteer Coordinator is integral in expanding the talent, expertise, and capabilities of the library through volunteer recruitment and management.
- Volunteers are indispensable to the optimal functioning of the library.

External Stakeholders

A variety of external stakeholders are considered by the library management team in decisions about the strategic development of the library.

- The core audience of the library is considered a valued external stakeholder and is comprised of:
 - Researchers
 - Schoolchildren and their teachers
 - Educational program attendees
 - Child visitors
 - Adult visitors
- Directors of the Foundation are integral to the future vision of the library.
- Members are key supporters as well as an audience.
- Donors are fundamental supporters whose concern with the future of the library is welcome.

Organizational Analysis

User Analysis

Users	Information-seeking behavior	Reason for use of library	Motivation to use library
Researchers (in-person, online) For example: authors, historians, educational program presenters, genealogists, graduate and PhD students	Local, national, and international professional or student researchers have a specific research program related to their studies or topics of interest.	Primary or secondary source materials in the library or archives match their research needs to a greater or lesser extent.	Desire to complete their work, research, or education. Suitability of the library's primary or secondary research materials to their research program. Proximity to the library for in-person researchers. Digital availability of library resources for online researchers.
Schoolchildren and their teachers	Teachers have an interest in expanding learning activities outside of the classroom. Students attend as a school field trip.	The library offers specific school education programs.	Teachers desire to introduce their classes to local history through presentations made by experienced library staff and exposure to primary source materials.

Users	Information-seeking behavior	Reason for use of library	Motivation to use library
			Students enjoy the time away from school, and may be excited and intrigued by the topics and materials presented.
Educational program attendees	Locals want to continue life-long learning relating to local history.	The library offers regularly scheduled educational programs at a nominal fee.	The library is close, comfortable, and a wealth of information. Many attendees are also members and their membership provides discounts on these programs.
Adult and child visitors	Visitors have a general interest in education and entertainment.	The library and archives are local resources for fascinating primary and secondary source materials.	Friendly staff and welcoming atmosphere make for a pleasant afternoon of casual learning and entertainment.

Resource Analysis

- Human Resources
 - The library is open during museum hours (Tuesday–Saturday 9 am – 5 pm) and staffed by the Librarian, Archivist, and Educational/Event Manager during those hours.
 - The Librarian and Archivist both have MLIS degrees and pursue continuing education through the American Library Association (ALA) and Society of American Archivists (SAA). Continuing education is typically a personal expense, as budget allotted for training is minimal.
 - The Educational/Event Manager is a credentialed teacher with a Masters in American history and pursues continuing education through the Association of American Educators (AAE). Continuing education is typically a personal expense, as budget allotted for training is minimal.
 - Anywhere from 2-5 volunteers work in the library during open hours. Volunteers work a variety of schedules, but typically only 3-10 hours per week. Volunteer background is varied, ranging from retirees with an interest in local history to MLIS, archive, museum studies, and history students.
- Technical and Electronic Resources
 - Hardware
 - The Librarian, Archivist, and Educational/Event Manager each have an iMac computer.
 - There are two iMacs available for public use in the library.

- The library owns two Mac minis with OS X Server for storage and networking.
- Software
 - Microsoft Office for Macs is utilized.
 - The catalog software used is PastPerfect and it houses the museum, library, and archives collections.
 - The current version of PastPerfect is desktop/networked only. There is no online access.
 - The library has posted its catalog in a basic finding aid Word document to its own website and to Scribd.com to allow broader access.
- Expertise
 - The museum uses an outside contractor as needed for IT setup, maintenance, and troubleshooting.
- Funding
 - Budget
 - The library has an annual operating budget of \$500,000.
 - All strategic initiatives are funded on a per-project basis by donor gifts, grants, or special allowances made by the foundation.
 - Funding sources and stability
 - The Covell Family Foundation provides stable funding at 75% (\$375,000) of total operating budget.
 - Donations and revenue from memberships, educational programs, auctions, the copy service and book sales comprise the other 25% (\$125,000) of the operating budget. This source of funding varies throughout the year and from year-to-year, and thus must be monitored closely.
 - Grants, special project donations, and project-specific foundation allowances are sporadic and monitored on a case-by-case basis.
 - The library enjoys the support of the Covell Family Foundation, and works to maintain this support by closely monitoring all investments the foundation makes and reporting on the success and value of strategic initiatives and general operation.
- Facilities
 - The library is composed of a large reading room that includes the stacks and archive files.
 - Access to the museum and library is monitored by volunteer receptionists who alert the Librarian, Archivist, and Educational/Event Manager when interested members of the public, researchers, or school classes arrive to use the library or archives or for an educational program.
 - Management team offices are located just off the reading room.

Products and Services Analysis

- Collections
 - Analog – The library houses 5,000 books and tens of thousands of photos, manuscripts, maps, and other ephemera in the archives. PastPerfect is used to

- manage the collection.
 - Books and archive material donations from the public are evaluated by appointment.
 - Book purchases or primary source material salvage are a fundamental responsibility of the Librarian and Archivist.
- Digital – The library has a fledgling digital catalog comprised of a Word document posted to the museum website and to Scribd.com. Much planning and investigation are required to build an accessible digital collection; this is the main strategic initiative of the management team.
- Programs
 - School Programs – The Educational/Event Manager has developed four different standing programs for local school field trips.
 - There is no fee for public schools.
 - There is a small fee for private schools, typically \$5 per child.
 - Adult Educational Programs – The Educational/Event Manager works with local authors, historians, and subject matter experts to develop a monthly series of lectures.
 - There is a \$10 per person fee for non-members (\$5 per person for members) for each monthly lecture.
- Services
 - In-person research assistance is provided by appointment.
 - Online research assistance is provided on a first-come, first-served basis. The Librarian and Archivist provide an initial response to all email and phone inquiries within 24 hours.
 - The library does not lend books or archive materials. All research must be done in-person or through individually scanned/copied images as time allows.
 - Basic copy/scanning service is provided for a fee.

Competitive Analysis

- Competition is comprised of local cultural heritage institutions and online cultural heritage institutions that may provide similar types of primary and secondary source materials. In both cases, the Fran Kaylin Library plans to investigate partnership opportunities to leverage the similarity of service rather than compete.
 - Local
 - The Pasadena Public Library, Pasadena City College Shatford Library, and the Huntington Library can be considered local competitors in terms of subject matter and similarity of materials. However, the Pasadena History Museum and Fran Kaylin Library are dedicated to collaborating with these institutions to share resources as well as best practices to improve products and services to all of our users.
 - Other
 - National and international cultural heritage sites (e.g., Google Books, Google Art Project, World Digital Library, Digital Public Library of America, and WorldCat) and databases compete for our users. One part of

- the digital collection initiative is to investigate ways of joining with these organizations to transform them from competitors into partners.
- With larger budgets and more technical expertise, these institutions, organizations, and companies are leading the way. The Fran Kaylin Library seeks to learn from them.
- Most of the library's primary source/archive materials are fairly unique and scarce. The fact that the collection is also very specific to Pasadena history creates a strong position locally and regionally.

Environmental Scan

Economic factors: Many residents of our community are still struggling financially due to the recent recession and slow economic recovery. As a result, the library's new memberships and renewals have dropped for the last five consecutive years. In addition, stock market instability has caused the value of the Covell Family Foundation's endowment to fall nearly 22 percent between 2007 and 2012.

Sociocultural factors: As the baby boomer generation heads into retirement, they use more of their leisure time for travel and learning about their family history and heritage (McKay, 2013). This is bringing a growing number of new visitors to the library and museum from other parts of the state and nation to do genealogical and historical research and participate in cultural programming.

Demographic factors: Nationally, demographics are expected to continue to shift over the next 25 years with the minority increasing from 34% as of 2010 census to 46% (Farrell & Medvedeva, 2010, p. 5). Pasadena is already ahead of these national averages when the Hispanic or Latino population is considered with the Asian and Black or African populations (U.S. Census Bureau, 2007-2011).

Technological factors: There is a growing trend for increased use of technology in museums and particularly in museum educational programs (Johnson, Witche, Smith, Levine, & Haywood, 2010).

SWOT

Strengths

- Three dedicated, intelligent, capable, and trained professionals manage the Fran Kaylin Library.
- Library and museum staff, founders, and donors have a distinct desire to (as much as budget allows) incorporate innovative technologies in the library to improve performance, increase value, and broaden the user base.
- The collection houses many unique primary and secondary source materials.
- The Covell Family Foundation is a stalwart supporter of library activities.
- The Museum Director is politically savvy and negotiates on behalf of the library.

Weaknesses

- The full-time professional staff is small and subject to work overload.
- There is a limited budget for strategic initiatives, and each initiative must be proposed and funded separately.
- There is a lack of on-site technical or IT experts.
- There is currently no online, accessible digital collection.

Opportunities

- Partnerships with local cultural heritage institutions can help increase resources and outputs for all institutions.
- Partnerships with other digital and online institutions, organizations, and companies can help increase the value of the library.
- Grant monies are available for digital collection development specifically (e.g., Preservation and Access Grants from the National Endowment for the Humanities).
- The solid membership and donor base are interested in supporting the work of the museum and library.
- Baby boomer researchers and adult learners comprise a growing audience for the library.
- The increasing minority population opens up a new audience for the museum and library. Educational programs for both adults and schoolchildren can speak to this more diverse audience.
- Trend for increased use of technology in museums and particularly in museum educational programs provides an opportunity to develop interesting and effective educational programs for both schoolchildren and adults (Johnson, Witche, Smith, Levine, & Haywood, 2010).

Threats

- Securing grants for digital collection development is risky. Also, grant applications have strict deadlines and require a significant investment of the library management team's time.
- Securing donations for digital collection development and other strategic initiatives is also risky and must be re-addressed annually.
- Funding from new memberships and renewals is not expected to return to pre-2008 levels until late in the plan period. In addition, the Covell Family Foundation's support will be equally slow to recover.
- Without adequate funding for digital collection development, the library runs the risk of becoming increasingly antiquated and losing more and more visitors to other online sources.
 - Trend for increased use of technology in museums and particularly in museum educational programs must be addressed, or its lack will be detrimental to the Fran Kaylin Library and the Pasadena History Museum.
- Increasing minority populations require new promotional efforts to reach these audiences, which have previously comprised a smaller portion of museum and library visitors (Farrell & Medvedeva, 2010, p. 12).

Operational Initiatives

Initiative 1: Provide outstanding educational programs for both adults and schoolchildren

Goal 1: Determine topics that will be relevant and engaging to minority audiences in the four annual programs for schoolchildren and 12 annual lectures for adults.

Objective 1: Each July, the Education/Event Manager will consult with other library and museum staff, area schoolteachers, and peers at similar libraries throughout the country to gather ideas for program topics that will appeal to minority schoolchildren. By August 1 each year, the Education/Event Manager will finalize the four topics for programs in the coming school year.

Objective 2: Each August, the Education/Event Manager will promote the program schedule by working with the library's Marketing Manager and IT consultant to post it on the library's website; email it to area schoolteachers; and print it on flyers to be posted at highly visible points throughout the library and stacked at checkout stations and the library's information kiosk.

Objective 3: In August, the Education/Event Manager will work with the IT contractor to ensure the page on the library's website listing its speakers for the current year has a form allowing visitors to suggest or request speakers or topics they would like to see featured in a future lecture. The form will be in both English and Spanish. It will be maintained on the website on an ongoing basis. By October 31 each year, the Education/Event Manager will finalize the schedule of 12 speakers for the coming calendar year.

Objective 4: Beginning November 1 each year, the Education/Event Manager and Marketing Manager will promote the speaker schedule on the library's website; on printed flyers throughout the library and at the information kiosk; and in emails to area newspapers and adult learning centers.

Goal 2: Investigate ways to incorporate new technologies into the library's educational programming.

Objective 1: Each year, the Education/Event Manager will review the New Media Consortium's annual Horizon Project reports to seek out ideas that might feasibly be adopted by the Fran Kaylin Library.

Objective 2: The Education/Event Manager will consult at least once per year with her peers at six libraries similar in mission and scope to the Fran Kaylin Library to determine how they are incorporating new technologies into their educational programming.

Initiative 2: Assist researchers in library and archives

Goal 1: Librarians and archivists ensure that finding aids are organized and easy to use on an ongoing basis in order for researchers to find relevant materials.

Objective 1: Either the Librarian or Archivist updates finding aids with new donations and any changes or corrections in a timely manner to make available to researchers.
Ongoing.

Objective 2: In January 2014, the Librarian will write a concise policy to put away all finding aids in their designated location upon completion of use or at the end of the day so that materials are available for future use.

Goal 2: Either the Librarian or Archivist will hold training sessions with staff and volunteers to ensure that they are familiar with the contents of the collection and how to use the finding aids in order to effectively assist users.

Objective 1: The Librarian is responsible for keeping staff and volunteers informed about the contents of the collection, particularly any new additions, how they're organized, where they're stored, and how they're cataloged so that staff can locate materials for users. Librarian and/or Archivist will hold these sessions as needed on an ongoing basis.

Objective 2: The Librarian will schedule regular meetings for staff and volunteers to have opportunities to ask questions and to share ideas about new or more efficient methods of cataloging materials in the collection or organizing finding aids. These sessions will be held as needed on an ongoing basis.

Goal 3: The Librarian and Archivist must assess and preserve materials to ensure they remain in good condition and to maintain access for users. Professional staff can assign appropriate tasks to staff and volunteers. Preservation activities are on an ongoing basis.

Objective 1: The Librarian will have specific policies regarding handling and storage of materials to avoid damage. These will be updated as necessary on an ongoing basis.

Objective 2: The Librarian and Archivist will train staff and volunteers to maintain materials, including repairing materials to be able to make them available to users. Ongoing.

Initiative 3: Continue to build analog collection

Goal 1: To grow the collection for the use of all internal and external users, the library will add donated analog materials to the library and/or archive collections within three months of donation. This is ongoing throughout the plan period of 2014–2016.

Objective 1: Donated materials are initially reviewed during the donation appointment, but a second, more thorough review is required and determines where/how/if the items will be incorporated into the collection. During the timeframe of the plan period, all donated materials will undergo thorough review within two months of donation. The Librarian and Archivist share review responsibility.

Objective 2: After review, items designated for the library or archives will be catalogued, conserved as necessary, labeled, and added to the physical collection within one month. The Librarian and Archivist will direct volunteers in this process. Any items not deemed appropriate for the collection will be offered at the next library/museum auction or donated to other museums and institutions as appropriate.

Goal 2: To grow the collection by approximately 60 books and 300 pieces of ephemera by increasing holdings related to Pasadena's Hispanic/Latino, Asian, and Pacific Islander populations to overcome the gap identified in the 2013 collection needs assessment. This goal will benefit all internal and external users, especially those of Hispanic/Latino, Asian, and Pacific Islander heritage.

Objective 1: Make tactful requests in the January–June 2014 monthly newsletters for donations of books and ephemera from families of Hispanic/Latino, Asian, and Pacific Islander descent. The Librarian and Archivist will work with the Museum Director and Marketing Manager to craft appropriate language for the donation requests.

Objective 2: During the first six months of 2014, the Librarian and Archivist will perform online searches (e.g., on eBay.com, Antiques.com), review inventory at local book and antique stores, and peruse offerings at local and regional estate sales for materials related to these three peoples' participation in Pasadena history. Purchases will be made as the grant funds for this initiative allow.

Objective 3: During the last six months of 2014, the Librarian and Archivist will review any donations received by way of Objective 1 for inclusion in the collection. After review, both donated items and items purchased by way of Objective 2 will be catalogued, conserved as necessary, labeled, and added to the physical collections. The Librarian and Archivist will direct volunteers in this process. Any items not deemed appropriate for the collection will be offered at the next library/museum auction or donated to other museums and institutions as appropriate.

Goal 3: During 2014–2016 and for the benefit of educational program attendees, the Librarian and Archivist will work with Education/Event Manager to determine what materials are required for creation of adult and school class educational programs.

Objective 1: For adult lecture programs, the Librarian and Archivist will meet with the Education/Event Manager quarterly throughout the plan period to review the following quarter's three lectures. If additional primary or secondary source materials are determined to be necessary for lecture development, the Librarian and Archivist will acquire those materials a minimum of one month prior to each lecture. Acquired materials will also be catalogued, conserved as necessary, labeled, and added to the physical collection; the Librarian and Archivist will direct volunteers in this process.

Objective 2: For school class programs, the Librarian and Archivist will meet with the Education/Event Manager in July of each year of the plan period to review the following year's four programs. If additional primary or secondary source materials are determined to be necessary for program development, the Librarian and Archivist will acquire those materials by September of each year. Acquired materials will also be catalogued, conserved as necessary, labeled, and added to the physical collection; the Librarian and Archivist will direct volunteers in this process.

Strategic Initiatives

Initiative 1: Needs assessment of digital collection user and stakeholder need

Goal 1: Determine what kinds of digital materials researchers would like to access at the library, and how often they would likely use the materials if they were available.

Objective 1: Beginning in January 2014, the Librarian and Archivist will develop a survey asking researchers what types of digital content they would like to be able to access at the library, and how often they would likely use the material.

Objective 2: In June 2014, library staff and volunteers will begin distributing hard copies of the survey to library visitors, encouraging them to fill it out and return it within 30 days. With the help of the library's external IT contractor, an online version will be posted on the library's website for those who prefer to respond through that medium.

Objective 3: After the survey has been made available to library patrons for 30 days, the Librarian will collate and analyze the responses in July 2014.

Objective 4: The Librarian will present the findings in a written report to the library's board of directors at its regular monthly meeting in August 2014.

Goal 2: Determine the percentage of patron requests for digital materials that the library is unable to fulfill because it doesn't have those items.

Objective 1: Between January and June 2014, the Librarian will create a spreadsheet log in Google Drive for recording the date and time a patron requests digital material from a staff member or volunteer, and whether or not the library is able to provide the requested material.

Objective 2: During the 30-day survey period in June 2014, library staff and volunteers will record this information in the spreadsheet log.

Objective 3: At the end of the 30-day period in July 2014, the Librarian will tally the number of patron requests for digital materials and calculate the percentage of those requests that could not be fulfilled.

Objective 4: The Librarian will present the findings in a written report to the library's board of directors at its regular monthly meeting in August 2014.

Goal 3: Conduct an internal needs assessment of technical, staffing, and monetary resources that would be required to build the library's digital collection.

Objective 1: Between January and March 2014, the Librarian will create a needs assessment instrument that will determine what resources of technology, staff, training, and funding are currently available for building a digital collection, and what resources in these areas would need to be acquired. She will consult with other library staff and the IT contractor as needed

Objective 2: In April and May 2014, the Librarian will perform the needs assessment, with the help of other library staff members as needed.

Objective 3: The Librarian will analyze the results of the needs assessment through June, July, and August 2014.

Objective 4: The Librarian will present a report of the findings to the library's board of directors at its monthly meeting in September 2014.

Initiative 2: Funding of digital collection development

Goal 1: Raise funds for digital collection development by directly accepting donations.

Objective 1: In 2014, display a box in a strategic location for visitors to place cash donations with a notice explaining that the funds are for digital collection development. The Marketing Manager and Facilities Manager will have primary responsibility for this activity.

Objective 2: Throughout 2014, post donations accepted or "Donate" on all print materials including brochures, newsletters, and bookmarks. Have a button on the library's website enabling visitors to donate online. Include a notice that the funds raised are for the purpose of expanding the digital collection. The Marketing Manager will have primary responsibility for this activity.

Goal 2: Raise funds by offering special donation incentives or membership levels.

Objective 1: Beginning in 2014 and continuing indefinitely, different donation levels will elevate members into successive categories such as silver, gold, and platinum for example. Those who donate between \$500 and \$1,000 would be at the silver level, between \$1,001 and \$5,000 would be at the gold level, and more than \$5,000 would be at the platinum level. The Marketing Manager will have primary responsibility for this activity.

Objective 2: Beginning in 2014 and continuing indefinitely, offer donors various perks depending on their donation amount. Donors giving more than \$500 would get a plate engraved permanently on a donation plaque according to their donation level. Donors of \$1,000 and above will be invited to VIP events. The Marketing Manager will have primary responsibility for this activity.

Goal 3: Raise funds via online fundraising sites.

Objective 1: In 2014, set up a fundraiser on Kickstarter or Fundrazr on the internet and use email distribution lists and social networking to get the word out about the fundraiser (what ~~its~~ it's about and for, etc.). The Marketing Manager will have primary responsibility for this activity.

Objective 2: Throughout 2014, identify all the possible areas on the internet to promote the fundraiser. Post information about the fundraiser on community websites, on local school, and city government sites. Marketing Manager will have primary responsibility for this activity.

Goal 4: The Librarian and Archivist will apply for the Preservation and Access Research and Development grant or other appropriate grants from the National Endowment for the Arts (<http://www.neh.gov/grants/preservation/preservation-and-access-research-and-development>). Due dates are dependent on new grants posted for the 2014-2016 period and deadlines delineated in those new grants.

Objective 1: Use funds for digital collection development from 2015-2016.

Objective 2: Comply with grant requirements regarding eligibility; use funds as directed by NEH; report on administration of funds back to NEH on the progress/success of digital collection development.

Initiative 3: Creation of digital collection

Goal 1: From January-June 2015, investigate, procure, and implement the appropriate software and hardware to develop a digital collection that will be accessible via the internet for the library's current and future researchers.

Objective 1: From January-February 2015, the Librarian and Archivist will investigate PastPerfect Online (PastPerfect Online, 2013) as a means of making the library and archive catalogs accessible online. Additionally, they will investigate the Multimedia Upgrade option (Witt, Whitfield, & Stepansky, 2012) as a way to make digitized versions of books and periodicals (assuming copyright has expired and the works are in the public domain, or copyright permission has been granted by owners) and digitized versions of all archive materials available through individual online catalog records.

Objective 2: In March 2015, the Librarian and Archivist will procure and install the software with the help of the museum's external IT contractor. The IT contractor will also provide recommendations on additional server storage capacity and other hardware (scanner, servers, etc.) and software upgrades to facilitate digital collection development. Additional Mac mini servers will be purchased. Web hosting plan will be evaluated to ensure appropriate bandwidth is available.

Objective 3: In March 2015, library and museum staff and selected volunteers will be trained in using PastPerfect Online, including the MultiMedia Upgrade option. The Librarian and Archivist will share training responsibilities.

Objective 4: In April-June 2015, the Librarian and Archivist will determine a launch date for the online catalog depending on how and when Objectives 1-3 are accomplished. The initial target date is June 2015. The Librarian and Archivist will work with the Museum Marketing Manager to plan appropriate launch activities and promotions. (The addition of actual documents to the catalog records will be ongoing. See Goal 2 below.)

Goal 2: Starting in July 2015 (or immediately following the launch of the online catalog) and continuing until complete, the Librarian, Archivist and selected volunteers will digitize books, periodicals, and archive materials and ephemera and add these to the online catalog records. This digitization effort will provide researchers with direct online access to the digital versions of the actual materials housed in the library (assuming copyright has expired and works are in the public domain, or permission has been granted by copyright owners) and archive. It is expected that this initiative will continue beyond the timeframe of this Strategic Plan.

Objective 1: The Librarian and volunteers will determine copyright status for all books and periodicals in the library. For works published post-1978, the U.S. Copyright Office online database will be consulted, <http://www.copyright.gov/records/>. For works published between 1891-1977 the Internet Archive will be consulted, <http://archive.org/details/copyrightrecords/>. Questions or issues will be directed to the U.S. Copyright Office. Begins July 2015 and ongoing until complete.

Objective 2: For works with expired copyrights and in the public domain, the Librarian and volunteers will search Google Books and the Internet Archive for already digitized copies. If no digitized copies exist, the books or periodicals will be scanned. Begins July 2015 and ongoing until complete.

Objective 3: The Librarian and selected volunteers will link digitized books and periodicals to the catalog records via PastPerfect Online's MultiMedia option. Begins July 2015 and ongoing until complete.

Objective 4: The Archivist and selected volunteers will scan archive materials and ephemera and link these files to the catalog records via PastPerfect Online's MultiMedia option. Begins July 2015 and ongoing until complete.

Goal 3: To offer the online collections to a broader audience, including researchers, educators, and students across the country and the globe, the Librarian will investigate opportunities to share the digitized material with institutions such as the Digital Public Library of America (DPLA), the World Digital Library (WDL), and the Internet Archive. This investigation should begin in approximately June 2015 with efforts to incorporate the Fran Kaylin Library collection into these other digital initiatives to be determined with the institutions.

Objective 1: In June-August 2015, the Librarian will contact the DPLA, WDL, and Internet Archive to learn more their goals, requirements, and interest in the library's collection.

Objective 2: In September and October 2015, the Librarian will determine metadata and scan format requirements with the individual institutions and develop a plan for implementation.

Needs Assessments

Method of developing a needs assessment instrument

The needs assessment instruments were developed by considering the requirements of this plan's strategic focus: to create a digital collection for the library. Both internal and external needs assessments will be performed.

External needs assessment

To develop a digital collection that will meet the needs of our core users, we must understand the needs of those users, particularly the library's researchers. "Assessment can help uncover perceptions but it can also bring us closer to our users and free us to use innovative thinking in creating more effective library services" (Alexander, Black, Field, & Vesper, 2004, p. 15). See Appendix A for the example of the external needs assessment instrument.

Internal needs assessment

The internal needs assessment was created based on a gap analysis template provided by Rose Chenoweth (Chenoweth, 2013). The template was modified to suit the needs of the Fran Kaylin Library. See Appendix A for the example of the internal needs assessment instrument.

Method of administering a needs assessment instrument

External needs assessment

The Librarian and Archivist determined that both paper and online surveys would allow users the most flexibility in responding. The paper survey will be available in the library, while the online survey will be available on the museum's website. The Marketing Manager will assist in promoting the survey to users and members via email, Facebook, and Twitter. Surveys have intentionally been kept to minimal questions in order to increase the response rate.

Internal needs assessment

The internal needs assessment will be completed in January 2014 during one or multiple strategic plan execution sessions held in the early morning when the museum is closed to the public. The Librarian, Archivist, Education/Events Manager, IT consultant, Museum Director, Marketing Manager, Curator, and Facilities Manager will be in attendance. See sample in Appendix A.

Results of needs assessment

External needs assessment

The needs assessment will help the Librarian and Archivist prioritize digitization, ensure the correct formats for digital materials, and begin to understand the demand for such materials. It will also potentially increase our volunteer base by discovering visitors with technical skills who are willing to help. As the needs assessment will not be administered until 2014, examples of completed instruments are not available for this plan.

Internal needs assessment

The needs assessment will show the gaps in technical, staff, and monetary resources that must be filled to effectively execute the creation of the library's digital collection. See Appendix B for a sample internal needs assessment has been completed for reference in this strategic plan and for reference during the January 2014 strategic plan execution sessions noted above.

Summary

This 2014-2016 strategic plan has outlined the necessary steps to create and implement a digital collection for the Fran Kaylin Library. Beginning with a review of the library's mission, vision, and values, the plan has analyzed organizational resources, stakeholder and user needs, as well as strengths, weaknesses, opportunities, and threats. The end result is a specific set of strategic initiatives that will enable the library to meet its goal of providing an accessible digital collection. Though this initiative will be time-consuming, it must not detract from the existing products and services offered by the library. The operational initiatives also outlined in this plan will ensure that existing services not only remain relevant, but are improved according to the needs of our new and prospective user groups. As Carpenter and Green explain, "Nonusers deserve relevant library services as much as the rest of us, and it is the library's fault, not theirs, that it does not appeal to them" (2009, p. 159). The Fran Kaylin Library must understand the needs and desires of its growing minority populations to build educational programs and collections that will be of interest to these valued members of our community.

Conclusion

This plan illustrates the steps necessary to expand the mission of the Fran Kaylin Library, to move beyond the library walls to reach new audiences through an accessible digital collection, while continuing to serve our core local audience. At the end of this plan period, the hope is that the library will be able to update its mission statement to:

It is the responsibility of the Fran Kaylin Library to execute services and programs in support of the Pasadena History Museum and the Covell Foundation that established it. The mission of the Fran Kaylin Library is to preserve and share the cultural heritage of the city of Pasadena **with the world** to enrich the lives, livelihoods, and educational goals of **the global community**.

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Appendix A – Sample Needs Assessment Instruments

External Needs Assessment Instrument

Attention visitors! The digital collection for the Fran Kaylin Library of the Pasadena History Museum is always looking for relevant materials to add to our collection and enhance our services to you. Would you take the time to tell us what you need from our library?

1. How important is it to you to be able to access the library's content – books, photos, records, etc. – in digital form?
 - a. Very important
 - b. Somewhat important
 - c. Not very important
 - d. Unimportant
2. What type of device would you access the digital collection from?
 - a. Laptop
 - b. Mobile phone
 - c. Tablet
 - d. Desktop computer
 - e. Other (please specify) _____
3. Is there a particular type of materials that the library should prioritize for digitization?
 - a. Photos
 - b. Ephemera
 - c. Books
 - d. Periodicals
4. Is there a particular topic that the library should prioritize for digitization?
 - a. Architecture
 - b. City planning and maps
 - c. Government
 - d. Civic events
 - e. Other (please specify) _____
5. Is there a particular time period that the library should prioritize for digitization?
 - a. 1800-1850
 - b. 1851-1900
 - c. 1901-1950
 - d. 1951-2000
 - e. 2001-present

6. Are you interested in volunteering your technical skills to make our library collection more current and relevant? If yes, please let us know how you would like to help.

Thank you for your time! If you're completing this survey by hand, simply give it to Library staff or scan and email it to library@pasadenahistory.org. Those completing the survey online will simply need to press the Submit button.

Sincerely,

Fran Kaylin Library staff

Internal Needs Assessment Instrument

Activity: Create a Digital Collection

Resource: Technical

Need	Have

Steps to fill gaps:

- 1.
- 2.
- 3.

Resource: Staff

Need	Have

Steps to fill gaps:

- 1.
- 2.
- 3.

Resource: Monetary

Need	Have

Steps to fill gaps:

- 1.
- 2.
- 3.

Appendix B – Example of Completed Internal Needs Assessment

Internal Needs Assessment

Activity: Create a Digital Collection

Resource: Technical

Need	Have
Software to put the catalog and collection online. Most likely using PastPerfect software, but expanding to an online package.	Gap
Sufficient server space to store digital catalog and digitized materials.	Gap
Website bandwidth to handle extra load	Gap

Steps to fill gaps:

1. Investigate PastPerfect Online and Multimedia Upgrade option to offer both catalog and collection online.
2. Determine what amount of data PastPerfect will host versus what the library will need to host.
3. Determine necessary bandwidth and compare to web hosting plan options.

Resource: Staff

Need	Have
Internal staff to investigate, create, and implement the digital collection	Librarian, Archivist, Curator, volunteers
External staff to provide technical support	IT consultant
Appropriately trained internal and external staff	Gap

Steps to fill gaps:

1. Will need to train IT Consultant, Librarian, Archivist, and selected volunteers to use PastPerfect Online software with Multimedia Upgrade.
2. Determine if PastPerfect offers training as part of the package price.

Resource: Monetary

Need	Have
Software purchase, \$2,500	Gap
Software support, \$1,000 for 2 years	Gap

through PastPerfect	
Purchase two additional servers, \$2,500	Gap
Web hosting upgrade, \$120 annually	Gap
Staff training, \$800 for 6 people	Gap
External IT consultant additional hours, \$1,600 for 20 hours at \$80/hour	Gap

Steps to fill gaps:

1. Determine funds required to purchase software and raise funds accordingly. Initial estimate is \$10,000, based on above gaps.
2. Work with Marketing Manager as outlined in Strategic Initiative 2 to raise funds through donation and membership campaigns as well as grants.