

# **Jackson County Library Services Performance Review and Quality Assessment**



***“What is more important in a library  
than anything else – than everything  
else – is the fact that it exists.”***

--Archibald MacLeish

Ruth Metz Associates

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FINAL

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# Jackson County Library Services Performance Review and Quality Assessment

## EXECUTIVE SUMMARY

### **Background**

The Jackson County Library District Board (Board) commissioned Ruth Metz Associates (RMA) to conduct a library services performance review and quality assessment. The Board is the governing authority for the Jackson County Library District (District) which was formed by a vote of the people of Jackson County (County) May 2014.

The District became a new public library jurisdiction after voters approved the district formation. This vote of the people authorized a permanent tax rate of \$0.60/\$1,000 and elected the District's first governing Board. Prior to this, the Library was a department of the County. In 2006 the County closed the Library due to a funding crisis, and then reopened it under contract with Library Systems and Services, LLC (herein after LS&S). The approval of the District creation by the voters stabilized the funding of the Library for the first time in over a decade. With no time to set up an operation of its own, the newly elected Board took over the County's contract to operate the Library. Subsequently, the Board entered into its own 5-year contract with LS&S, beginning July 1, 2015.

The Board is the governing authority for the Library and LS&S is responsible for operating the Library according to the operating policies of the Board. The Library is comprised of 15 branches, most of which are located in municipalities. The District contracts with the County (which will own the library facilities until the bonds are paid off in 2020), for building maintenance and landscaping. The Rogue Valley Council of Governments (RV-COG) performs administrative and accounting services for the District. Action Security provides security guard services at the Medford branch, and Pathways, Inc. provides janitorial services for all the branches.

### **Purpose**

The main purpose of the assessment is to determine how the services delivered by the District and its contractor, LS&S measure up under the Standards for Oregon Public Libraries (OLA Standards), as well as other generally accepted standards for library operations. The analysis was to:

1. Take into account how the Jackson County Library System (JCLS) compares with libraries of interest to the Board on key measures.
2. Identify areas of high performance and areas that present opportunities for improvement.
3. Identify best practices and innovations that are relevant and practical for meeting OLA Standards.
4. Include recommendations for program refinements, new strategies, and resource modifications that might be required to better achieve District objectives.

One additional requirement of the review was “to examine the extent to which the library services contractor, LS&S, is meeting its performance obligations under its agreement with JCLD, with specific consideration of the warranty provision on page 5, Section 10(c).”

## How Jackson County Library Measures Up

The Library has faced enormous threats to its existence over the last decade. It is a colossal credit to the people of the County and to the advocates of the Library that the District exists. Not only does it exist, it has a permanent and dedicated funding source, thanks to the voters of the County. It has an elected, dedicated Board, whose members are knowledgeable and deeply committed to serving the community through a Library that is relevant and responsive.

The OLA Standards are a set of qualitative standards created under the auspices of the Oregon Library Association (OLA) in 2015. There are 144 specifications the OLA considers “essential” and another 49 “enhanced” and 32 “exceptional” specifications. All of these specifications are grouped in seven categories.

We assessed the Library’s attainment of the OLA Standards and concluded that the Library solidly meets 53 (37%) of the 144 essential specifications. Many of the remaining essential specifications are near to being met and in some cases the Library exceeds the essential specifications. This report includes an explanation of our ratings, as well as strengths, gaps, and recommended actions.

The Library is a viable public library system serving the third largest public library jurisdiction by population in Oregon. Its 15-branches, all constructed between 2001 and 2007 following the approval by voters in 2000 of a bond measure are a credit to the municipalities in which they are located, to the Library Foundation, and to County residents. Its Board, its staff, and its Friends, Foundation, volunteers, and other advocates are committed to making it the best it can be for all of the people of the County.

## High Level Findings and Conclusions

### Governance

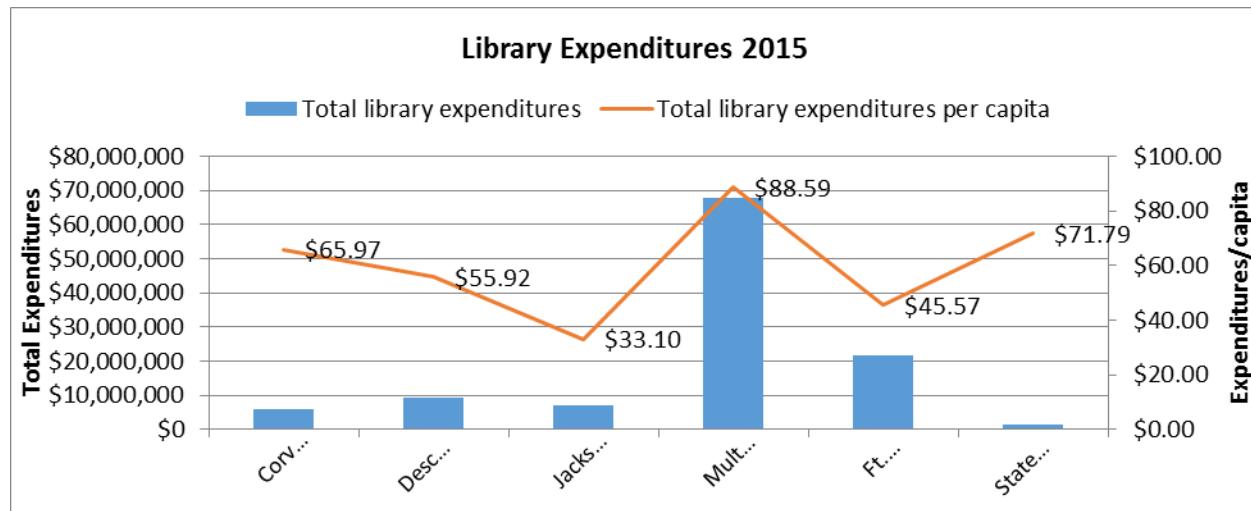
The Board has effectively launched the District. The commitment and capability of the Board and its members are impressive. The Board clearly set a high bar for the strategic planning process, involving over 1,000 community members. Members of the community are very impressed and thankful for all of the efforts of the Board, for their dedication, and for their high standards for community engagement.

The third-party vendor model increases the ambiguity of the roles. Individual Board members serve on committees and perform in an administrative and quasi-managerial capacity, performing functions that would normally be those of the Library Director.

The Board members' willingness to wear more than one hat for the Library (e.g. Board member, Library Friends officer, Foundation Board, volunteer worker) is laudable and perhaps necessary in the near-term. It is important for the Board to continue to build muscle in governance and to come together as a Board in determining the priorities of the District.

### Expenditures and Board Due-Diligence

The operating expenditures per capita for the District are the lowest of the Board's comparator libraries and well below the state average. This impacts the service levels and service output, keeping them lower than other libraries and in some cases below OLA Standards (e.g. hours of service).



The chart above shows the library operating expenditures and expenditures per/capita reported by the comparator libraries in their annual reports to the state library in Oregon and Washington (for Ft. Vancouver) in 2015. Library expenditures, actual (\$5,161,705) and per

capita (\$25.02), were even lower in 2016. Meanwhile, comparator libraries' expenditures increased, making the Library even less competitive in 2016 than 2015.

The Board, by law, is responsible for the provision of library services and for the prudent use of District funds. It is within the Board's power to provide more funding to increase service levels.

The Board also has the authority to increase the tax rate (now at \$0.52/\$1000), up to the tax rate limit of \$0.60/\$1000 of assessed valuation. However, the issue is more complex than raising revenues alone.

The Board, as legal stewards of the Library, wants to be confident that money is well spent on behalf of the community. However, the Board's confidence that the money is being well spent is limited by the lack of LS&S transparency. In 2015-16, direct expenditures for the Library by LS&S accounted for 65% of the District's payments to LS&S; 35% is assumed to be LS&S costs and profit.<sup>i</sup> LS&S's definition of proprietary information limits the Board's ability to account for the District's use of funds.

### **Third-Party Contractor for Library Operations**

Contracting the operations of the Library, including the hiring of the Library Director, to a third party makes matters more complex than they otherwise would be for the Board. There is a reason why the Oregon Revised Statutes<sup>1</sup> and the OLA Standards specify that the Board will hire the Library Director. In any library structure, but especially in a library district, the role of the Board and the Library Director is critical to the effective leadership and development of the Library in the community. That partnership, the capability of the Library in particular, and the uncompromising allegiance of the Library and the Board to the community is paramount.

It is particularly important to address what additionally the Board must do to "bridge the gap" of management over the term of the contract with LS&S. The gap in management has to do with planning, measurement, and evaluation. The Library needs a technology plan, a collection development plan, a disaster preparedness plan, and it will need a marketing plan and a facilities master plan. These are typically functions of management and are undertaken by the Library Director with the assistance of staff.

The District needs to be on top of its financial accounting and reporting<sup>ii</sup>. The District Board and it alone is responsible for the accuracy of its accounting and for the accuracy and completeness of its reports. Whether to the State Library or other entity, the District must be able to verify

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<sup>i</sup> ORS Chapter **357.226 District board members; appointment of librarian.** (1) The officers of the district shall be a board of five members, to be elected by the electors of the district. The district board shall appoint a district librarian, who shall be the secretary for the district.

the veracity and accuracy of its reporting. Having a third party vendor complicates this but the District should have recourse through the contract it makes with any third party vendor.

Typically, the Library Director is responsible for understanding all revenues and expenditures, for putting together a budget for the Board, for monitoring the budget, for reconciling with the assistance of an accountant or financial officer the budget and for accurately compiling reports of the district. The Library Director would work with the accountant or fiscal officer of the district to insure accuracy of the data and to comply with the instructions of the State Library for completing the report. Compliance with the instructions helps insure that the State Library's database for public libraries is accurate and that spending categories and reporting methods are consistent across the database. The State Library uses this data for many purposes. The data also goes into a national database where it is searchable by agencies and individuals for a variety of purpose.

## **Library Management and Development**

In principle, the Board's role is to govern while the Library Director's role is to manage the Library. The Board and the Library Director, together, are responsible for library development. Library development goes beyond administration of operations to the matter of leadership: dynamically and responsively leading the Library in a continuous effort to serve the community well and efficiently. It is not clear that LS&S expects the Library Director to be more than an operational administrator.

The absence of a written service plan, staffing plan, technology plan, a contemporary collection development and management plan, and the existence of many dated operational policies, is concerning. Why is this when LS&S has been operating the Library for 10 years? The Board is relatively new, but LS&S is not. Not only are these best practices absent, but it is extremely worrisome that the Board has to get involved in management functions in order to find out what is going on.

## **Services to Latinos**

Latinos make up 12.4% of the population of Jackson County. In the 24 years between 1990 and 2014, the Latino population in Jackson County grew from 5,949 to 25,323. Growth in library services to Spanish speakers has not matched this explosive growth. The Strategic Plan does not specifically identify goals and strategies for serving Latinos. Based on the calendar of upcoming programs, there are no storytimes in Spanish (there is outreach to Spanish-speaking childcare). The system offers a Book Club in the Bag collection, but only English titles are offered. There are definite holes in the Spanish-language collection. Spanish language materials written or produced by people from Latino cultures are needed. The slim collection of Spanish-language materials, combined with the lack of programming targeting Spanish speakers or recent immigrants, and the lack of a Spanish-language website, gives the overall impression that Spanish speakers are not considered part of the community nor welcome at the Library.

Are there sufficient bilingual/bicultural persons on the JCLS staff? Is there a contract with a translator to render key parts of the website in Spanish? Is there a plan to ask Spanish-speaking/Latino community members about their needs and wants? Can you build or improve partnerships with other agencies serving local Spanish-speakers? Will the Library send someone to the Guadalajara Book Fair or better yet, participate in *Libros for Oregon*, a grant-funded Spanish-book-buying cooperative project that will be open to all Oregon libraries? No library has the bandwidth or the existing skills for everything, but this is a significant portion of the Jackson County community.

## High Level Recommendations

Based on interviews of Board members, it seems that the Board is unlikely to continue contracting out library services in the long term. Therefore, the Board should orient and organize itself to pursue two parallel paths for library development: a path for the near term and another for the far term.

The goal of the near term path would be to work with LS&S to implement those aspects of the Strategic Plan the Board decides should be implemented and to increase the library's adherence to OLA standards. The specific standards and measures could be identified in a contract addendum. The goal of the far term path would be for the Board to develop its plan for operating the Library in the future. Ideally, LS&S would work collaboratively with the Board for a smooth transition. These two plans could lead smoothly from one to the other.

With funding levels for staffing and collections, per capita, to be the lowest among comparator libraries, we would like to be able to recommend that the Board commit additional funding in these areas. The Board is understandably concerned about the overhead costs. It seems necessary, however, and reasonable to commit to the positions recommended by LS&S for the advancement of Strategic Plan initiatives but not to increase hours in the near term.

## LS&S Performance Obligations

As previously noted, one additional requirement of this review was "to examine the extent to which the library services contractor, LS&S, is meeting its performance obligations under its agreement with JCLD, with specific consideration of the warranty provision on page 5, Section 10(c)."

The "Library Administration and Operations Agreement" (Agreement) between the Board and LS&S is very broad and unspecific. The Schedule A, referenced in and part of the Agreement is also unspecific as to the deliverables, except for hours of Library operation. The only quantifiable measure in the contract is hours of library operation and this is how LS&S measures its performance, according to Dana Braccia, LS&S Vice President, Library Operations and the Library's Interim Director.

# PERFORMANCE REVIEW AND QUALITY ASSESSMENT

## **Approach**

One of the purposes of this Project has been to identify best practices. The OLA Standards ARE best practices. The specifics of the OLA Standards have been thoughtfully and purposely developed by the library professionals of Oregon with a great deal of study and deliberateness.

We have treated the OLA Standards as aspirational for the District: it is a new entity, with a Board that wants to set its priorities for the future. We focused on the essential level specifications.

We have taken the approach that our evaluation should be based on the intent of the OLA Standards and be backed-up with evidence, if possible. Where we could not find evidence that a specification is in place (both evident and sustained), the rating is “no”. We have rated each specification in the context of the intent of the given standard.

For example, one of the desired outcomes of the Staff standards for staff is that *“Every Oregon citizen, regardless of rural, urban, or suburban locality, enjoys the benefits of professional and professionally assisted staff. These excellent staff members provide professional, relevant library services and collections that meet and exceed community needs and expectations.”* The comparatively low number of librarians, in addition to other comparative factors, influenced our “no” rating, despite a “yes” rating given by Library Management.

Our approach has been to use the assessment to draw a starting line for the Board as it plans the District’s future and establishes its priorities. For example, one of the specifications calls for a collection management plan. We have rated that specification as a “no” even though the District has a materials selection policy. We reasoned that a collection management plan is more expansive and considered in the industry a best practice; the District’s materials selection policy is dated, more limited in its scope, and will need to be updated to align with the new Strategic Plan. If the Board is aware of this, it is better prepared to set priorities and plan its time. Further, these details give the Board, LS&S, and the new Library Director common ground for identifying the work they need to accomplish together.

We have used various avenues to assess the Library’s performance and quality. For instance, the OLA Standards refer to the Edge Initiative, which has produced a nationally recognized management and leadership tool for technology assessment and planning. While the Library might minimally meet the list of specifications in the OLA Standards for technology, the “Edge Assessment Results for Jackson County Library Services on June 13, 2016” suggest otherwise, resulting in a “no’ rating for some specifications. Without diminishing the significant accomplishments and efforts of the Library, we rated the Library on its standing in actually meeting the essential OLA Standards: for example, LS&S has a technology plan but one with

which the Board does not agree nor adopted. On this particular specification, we gave the Library a “no.”

Our analysis of the Library’s standing amongst comparator libraries is included where applicable. The 2015 Oregon Public Library Statistical Report is the base year for comparison for Jackson County Library District, Corvallis-Benton County Public Library, Deschutes Public Library District, and Multnomah County Library. The Ft. Vancouver WA data is from the 2015 Washington Public Library Statistical Report. The 2016 reports for the Oregon libraries, the last of which was received days ago, were also analyzed; the attendant narrative indicates where there are notable variations.

## Preface to Findings and Conclusions

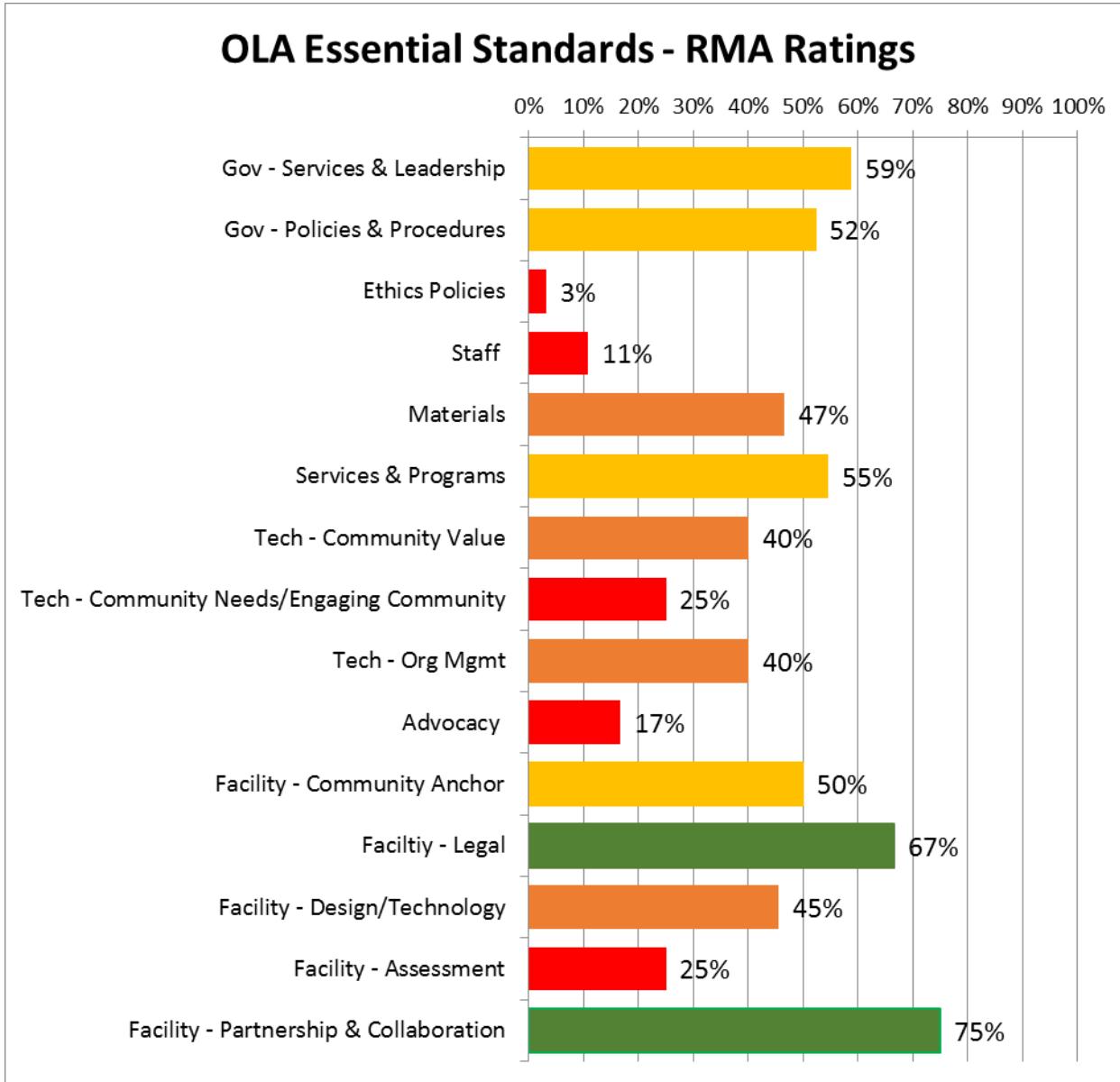
The District meets many of the OLA Standards at the “essential” level but falls short of them in significant ways. Of 144 essential specifications, the District solidly meets 51 or 35%.

Several of the OLA specifications can be addressed relatively quickly and directly by the Board by adopting policy statements: for example, in the categories of Governance, Ethics, Advocacy, and Facilities. Meeting standards for Staff, Materials, Services and Programs, and Technology will be more challenging. The challenges have mainly to do with funding levels and the District’s third-party vendor model.

The “dashboard” shows at a glance how the Library is doing in the seven OLA Standards categories. The dashboard correlates to the number of “yeses” as a percentage of the number of specifications in the category or subcategory. Not all categories have sub-categories. In the Staff category, we combined all of the “yeses” because 3 of 4 sub-categories have no “yes” ratings.

Following the dashboard is an explanation by category of the OLA Standards: intent, rating, strengths, gaps, and recommended actions. We have referenced best practices, where applicable, with examples or links to examples.

## OLA Essential Standards Performance Overview - Dashboard



## **GOVERNANCE: SERVICES AND LEADERSHIP**

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### **Intent**

Governance standards ensure that each Oregon public library is legally established, publicly funded, and publically managed in a way that provides transparency and accountability to the taxpayers. The intent is to ensure that the entity is responsive to the community served, and has policies and procedures in place to establish competent Library Management and lawful employment practices.

The intent of the Services and Leadership standards is that the governing authority for the library will adopt and review national and local policies responsive to the local community. The desired outcome is that *the community has access to free public library services and is confident in the effective leadership of the library.*

### **Rating**

The District is 59% compliant with the OLA Standards specifications in the Services and Leadership category at the essential level: of 17 specifications, the District solidly meets 10.

### **Strengths**

The library is legally established and has solid local government funding. The Board has adopted the ALA Library Bill of Rights, the ALA Freedom to Read statement, and the ALA Freedom to View statement. The Board has staggered, finite terms, meets at least quarterly, and has written governance policies. There is a current mission statement for the Library developed in concert with the community.

### **Gaps**

#### **Gap 1: Library Director and the Board**

The specifications state that the governing body hires the director according to local, state and federal regulations and delegates the day-to-day management of the library to the director. The fact that the position of Library Director does not report to the Board and is accountable instead to a third-party vendor is counter to the OLA Standards. It may also be counter to the Oregon Revised Statutes (ORS) Chapter 357.226.<sup>2</sup>

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<sup>2</sup> **District board members; appointment of librarian.** The officers of the district shall be a board of five members, to be elected by the electors of the district. The district board shall appoint a district librarian, who shall be the secretary for the district.

## **Gap 2: Library Management**

The management of the Library, which should be delegated to the Library Director, in practice is split between the Library Director and members of the Board. Not only is the Library Director not accountable to the Board, he/she is not performing all of the functions typically expected of the Library Director.

Here are two examples of the “management gap” where functions that typically would fall to the Library Director do not in the District’s case.

- A. The process for submitting reports to the State Library has resulted in inaccurate reporting. We examined the 2014-2015 and 2015-2016 Oregon Public Library Statistical Reports. The data therein is the basis of comparison with the comparator libraries. The revenue and expenditure reported, which is crucial to establishing the per capita revenue and expenditure comparisons, was vastly different from what we found on the District’s 2016-17 budget document (this shows prior years 2014-15 and 2015-16). We found discrepancies in both fiscal years.

The State deadline for report submission is October 1 for the previous fiscal year, July – June. From June 30 to October 1 is the window for reconciling revenues and expenses. This is also the window for completing the financial audit. Having the audited figures would ensure that the district’s actual revenues and expenditures are accurately reported to the State Library. The report should be reviewed by the District Board for accuracy and final approval before submission to the State Library.

- B. It is not transparent for the District to verify the accuracy of data entered into the State Library report by LS&S on the District’s behalf. This is particularly concerning when it comes to the expenditures reported by LS&S. The District cannot know for certain if the amounts reported to the State Library on behalf of the District in these categories are accurate: salaries and wages, employee benefits, books and other print materials, periodicals and other serial subscriptions, electronic materials, and other materials.

As a new and developing District with a new and developing Board, and having had considerable turnover and vacancy in the Library Director position, it is understandable and even necessary for the Board members to be active on behalf of the Library. What is management, what is library development, and how does library development and governance overlap? These are important questions for the Board for the remainder of its contract term with LS&S.

Typically, the Library is responsible for understanding all revenues and expenditures, for putting together a budget for the Board, for monitoring the budget, for reconciling with the assistance

of an accountant or financial officer the budget and for accurately compiling reports of the district.

The Library Director should work with the accountant or fiscal officer of the district to insure accuracy of the data and to comply with the instructions of the State Library for completing the report. Compliance with the instructions helps insure that the State Library's database for public libraries is accurate and that spending categories and reporting methods are consistent across the database. The State Library uses this data for many purposes. The data also goes into a national database where it is searchable by agencies and individuals for a variety of purpose.

The District needs to be on top of its financial accounting. The Board alone is responsible for the accuracy of its accounting and for the accuracy and completeness of its reports. Whether to the State Library or other entity, the District must be able to verify the veracity and accuracy of its reporting.

### **Gap 3: Board Priorities**

The Board members' willingness to wear more than one hat for the Library (e.g. Board member, Library Friends officer, Foundation Board, volunteer worker) is laudable and perhaps necessary in the short-term. It would be best, however, to find recruits for these other roles, so that the Board members can focus on governing. The third-party vendor model increases the ambiguity of the roles. It is important for the Board to continue to build muscle in governance and team capability through coaching. The Board members must come together as a Board in determining its priorities for strategies and service that will be in the community's best interests.

### **Gap 4: Board and Library Policies**

There are some very important policy statements in the OLA Standards that are either absent or not easily found; the recommendations below explicitly identify these.

## **Recommended Actions**

### **Near-term 1: ORS Chapter 357.226**

The Board should consult with the appropriate authorities concerning its responsibilities and options under ORS Chapter 357.226.

### **Near-Term 2: Library Director and Board**

The Board and LS&S should work together to clearly delineate the responsibilities of the Library Director. They should likewise clarify the roles and responsibilities of Board members in quasi-managerial functions, distinguishing between management, library development, and

governance. The results of this should be in writing in the form of a memorandum of understanding.

### **Near-Term 3: Annual Report to the State Library**

The Board should submit the prescribed annual report to the State Library, one that has been completed by the Library Director, and examined and accepted by the Board prior to its submission to the State Library.

### **Near-Term 4: Board Priorities**

The Board should work together to establish Board priorities for the District and the Library.

### **Near-Term 5: ALA Statement on Confidentiality, Access for Minors**

The Board should strengthen its compliance with the OLA Standards by adopting these specific ALA statements: the ALA Statement on Confidentiality of Library Records and the ALA Free Access to Libraries for Minors.

### **Far-Term 1: Board Hires the Library Director**

The Board should hire the Library Director, delegate the management of the Library to the Library Director, and evaluate the Library Director's performance. The Library Director should be directly accountable to the Board.

## **GOVERNANCE: POLICIES AND PROCEDURES**

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### **Intent**

The intent of the Policies and Procedures category is that the Library has standard written operational policies and procedures, adopted and reviewed by the Board. The desired outcomes are (1) *that community members have access to public library services provided in a consistent manner and that Community members consistently experience efficient, effective and courteous library service.* In addition, the desired outcomes include that (2) *the community benefits from well-planned library services, technologies and facilities. Community members are aware of the library's role in their community and have access to the library's long-range plan. Community members are engaged in library assessment and planning and are more knowledgeable about the library and its impact on the community.*

### **Rating**

The District is 52% compliant with the essential-level OLA Standards specifications in the Policies and Procedures category: of 21 specifications, the District solidly meets 11.

### **Strengths**

The Board has made a concerted and sustained effort to review, revise, and add operational policies for the Library. With Library Management, the Board has addressed the most pressing policies first, with the intent of developing policies that have staff input and incorporate industry best practices. Legacy Policies refer to those that are in the "Jackson County Library Services Policy Manual". The Board therein adopted the policies in June 2015.

The eleven specific topics in the OLA Standards with which the Board complies are: circulation, confidentiality and privacy, facilities (Legacy), exhibits and displays, finances, gifts and donations (Legacy), internet and other technology, request for reconsideration, rules of conduct, use of equipment, and use of library meeting rooms.

### **Gaps**

#### **Gap 1: Dated Policies, Difficult to Locate**

The Board lacks 9 of 20 specific policies, either current or Legacy Policies. Many of the Legacy policies date back many years. Anyone searching for the policies on the Library and District websites will discover that they are not easy to find and that some are extremely dated.

We include the following table to show the list of policies, those that the Board has and those that are needed or are in need of updating.

**OLA Standards: Governance**

**A2.0 Policies and Procedures**--The Library has written operational policies and procedures, adopted and reviewed by the appropriate authority, which cover the following standards.

*Outcomes—Community members have access to public library services provided in a consistent manner. Community members consistently experience efficient, effective and courteous library service.*

*Outcomes--The community benefits from well-planned library services, technologies and facilities. Community members are aware of the library's role in their community and have access to the library's long-range plan. Community members are engaged in library assessment and planning and are more knowledgeable about the library and its impact on the community.*

	<b>Yes</b>	<b>No</b>	<b>Standard</b>
A2.1		x	All operational library policies are reviewed at least once every three years
A2.2	x		Circulation
A2.3		x	Collection Management
A2.4	x		Confidentiality and Privacy
A2.5		x	Emergencies and Safety
A2.6	x		Facilities
A2.7	x		Exhibits and Displays
A2.8	x		Finances
A2.9	x		Gifts and Donations
A2.10		x	Human Resources
A2.11		x	Interlibrary and Interagency Cooperation
A2.12	x		Internet and Other Technology Issues
A2.13		x	Patron Suggestions
A2.14		x	Programming
A2.15	x		Request for Reconsideration of Materials
A2.16	x		Rules of Conduct for Library Users
A2.17		x	Social Media
A2.18		x	Strategic Plan
A2.19		X	Technology Plan
A2.20	x		Use of Library Equipment
A2.21	x		Use of Library Meeting Rooms

## Recommended Actions

### Near-Term 1: Systematic Policy Review, Revision, Addition

The Board should continue its systematic review and revision of policies, making the following topics a priority: collection management, emergency and safety, interlibrary and interagency

cooperation, patron suggestions, programming, social media, strategic plan, technology plan, and facility plan, including capital improvement plan. Develop a schedule with the Library Director for systematic review, revisions, updates, and new policies.

### **Near-Term 2: Three-year Policy Review Commitment**

The Board should adopt a policy to review the Library's operational policies once every three years. This could be done on a three-year rotation, with the proviso that on-demand policies receive special attention. The Board and the Library Director should establish a policy review and development schedule with the goal of relevant policies systematically maintained.

### **Near-Term 3: Make Policies Easy to Find**

All of the Board's policies, those on the District website, those in the Legacy policies, and those newly adopted by the Board should be easily found on the District's website.

### **Near-Term 4: Disaster Preparedness, Advocacy**

While it is not an essential-level specification to have a disaster preparedness plan, we recommend that the District investigate its responsibilities for doing so. The District is its own legal entity, not affiliated with a parent jurisdiction such as county or city government. We recommend checking with the Special District Association of Oregon for assistance with this question. We recommend the Board adopt an Advocacy Policy as this will draw attention to the need and clarify roles of the Board and staff, Friends and Foundation.

### **Far-Term 1: Additional Policy Assurance**

The Board should review the policies, board and operational, of the Deschutes Public Library for comparative purposes. Pay particular attention to comparing by-laws and the Board's governance policies and financial policies and procedures. These actions would provide the Board assurance that it has addressed the topics unique to library districts to the extent the Board wishes. We recommend looking, too, at the Pierce County Library District (WA); this district has done an exceptionally good job with its policies in terms of scope and best practices.

# **ETHICS POLICIES**

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## **Intent**

The ethics standards are intended to ensure that each Oregon public library adheres to the library profession's ethical principles. The intent is to associate the Library District with the American Library Association's code of ethics, and thereby to codify and make known to the organization and to the general public the ethical principles that guide the work of librarians, other professionals providing information services, library boards and library staffs.

The policies of the Board influence or control the selection, organization, preservation, and dissemination of information. In a political system grounded in an informed citizenry, the Board represents that it is explicitly committed to intellectual freedom and the freedom of access to information. The Board acknowledges and endorses that library professionals have a special obligation to ensure the free flow of information and ideas to present and future generations.

The specifications under the Ethics category are statements from the ALA Code of Ethics. These codes of ethics were Adopted at the 1939 Midwinter Meeting by the ALA Council; amended June 30, 1981; June 28, 1995; and January 22, 2008. The principles of this Code are expressed in broad statements to guide ethical decision-making. These statements provide a framework; they cannot and do not dictate conduct to cover particular situations.

## **Rating**

The Board policies do not at this time include any of the OLA Standards specifications in this category. This can be readily changed to a full-compliance rating with the adoption by the Board of the ALA Code of Ethics. We gave the Board credit in the dashboard rating for its recent adoption of the Oregon Ethics Law Policy; however, this is not a specification of the OLA Standards.

## **Strengths**

The Board adopted (Oct 13, 2016) the Oregon Ethics Law Policy.

## **Gaps**

### **Gap 1: ALA Code of Ethics**

The ALA Code of Ethics has not been adopted by the Board.

## **Recommended Action**

### **Near-Term 1: Adopt the ALA Code of Ethics**

The adoption of the code would bring the District to full compliance at the essential level.

# **STAFF**

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## **Intent**

Library staff create and maintain programs and services integral to the mission of the public library in relation to its community. The design of the staffing standard supports both the processes and resources necessary to provide equal, consistent, and quality service in a manner sustainable for the future.

Library staff and volunteers contribute to the library's primary mission: providing uncompromising access to information. All library staff actions are in service to the public and social wellness of the community.

Library staff, regardless of degree or position, must possess the depth and breadth of knowledge necessary to provide quality service. To ensure service of the highest quality, libraries must provide all staff with the education, training, and support necessary to identify and meet the needs of their patrons and community.

The OLA Standards for the staff category has four sub-categories: human resources, staff diversity and community engagement, staff duties and responsibilities, and staff development and learning.

## **Rating**

Of 28 essential specifications in the Staff category, the Library meets 3, or 11%. They are that the Library employs a full-time ALA-accredited MLS Library Director (technically, LS&S is the employer); that the Library employs paid staff members during all the hours the Library is open; and that volunteers are selected through a defined hiring process which may include a background check.

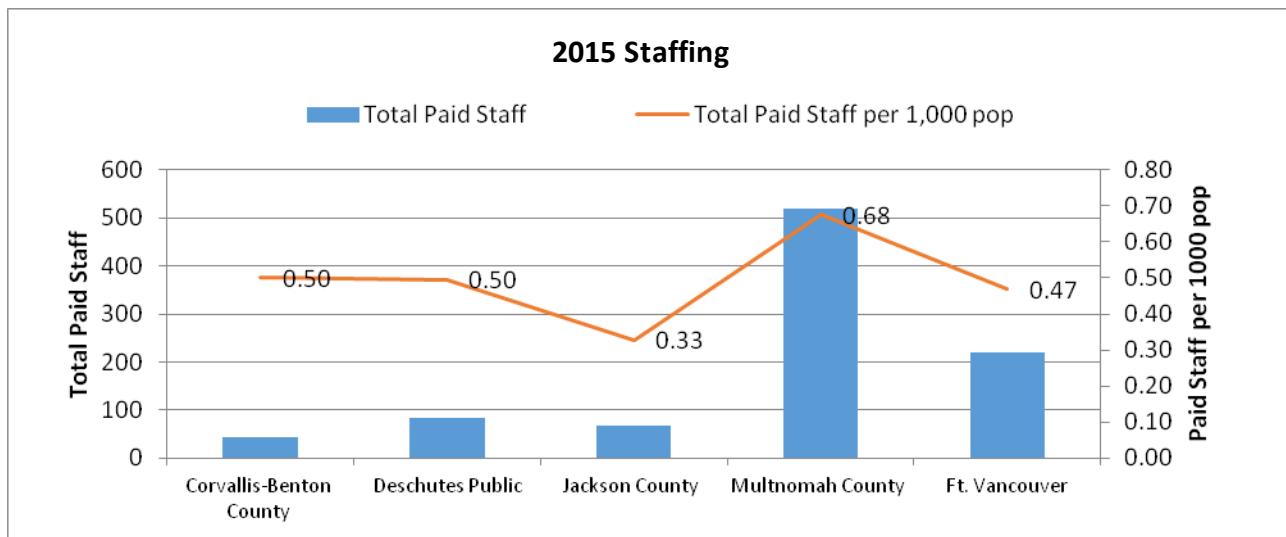
## **Strengths**

The staff appears to be dedicated to the Library and is accomplishing a great deal under what appears to be very challenging circumstances. Library Management says that it is proudest of the staff and what it has been able to accomplish. We recognize the long-time staff that have seen the Library through its tumultuous journey.

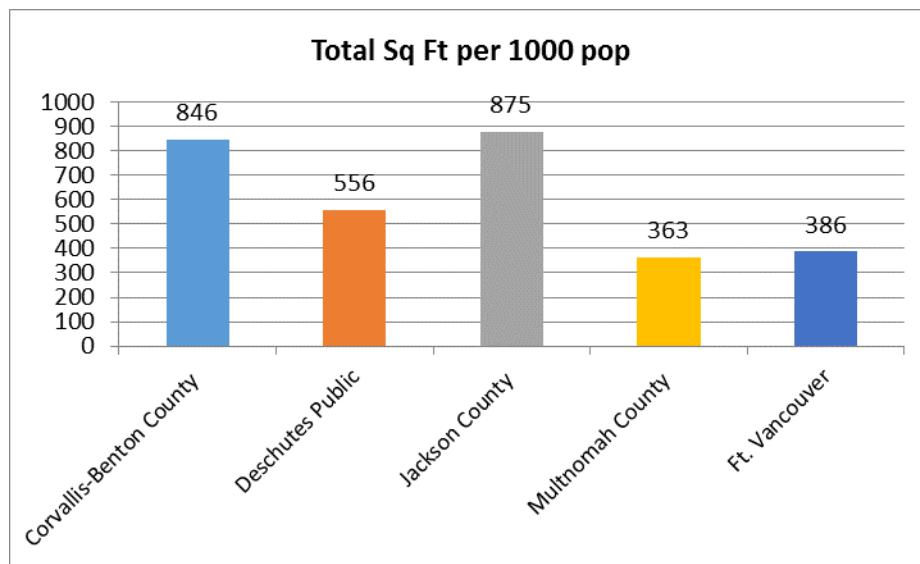
## Gaps

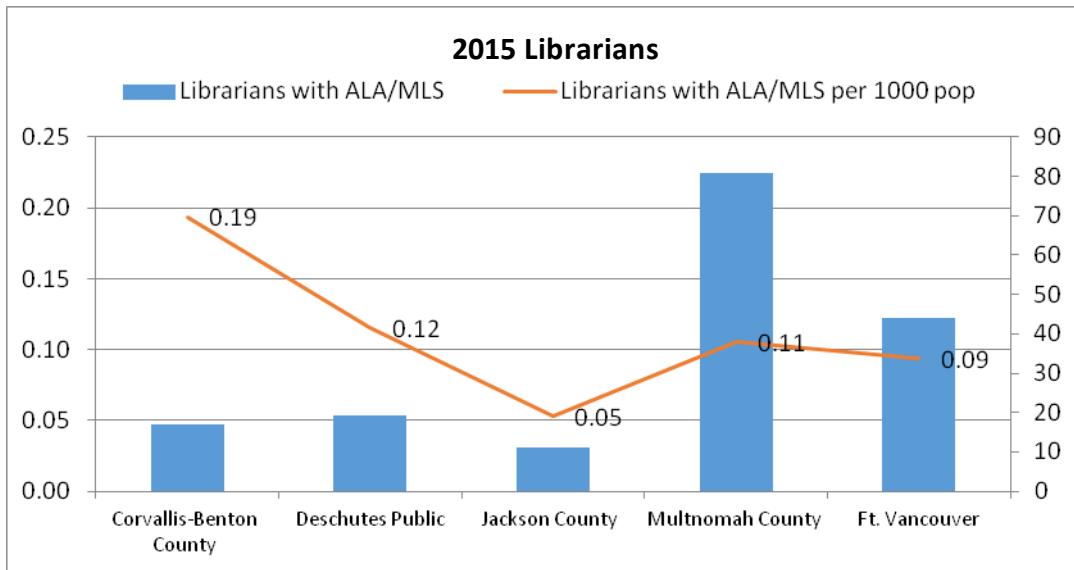
### Gap 1: Key Staff Indicators Low

The key benchmarking indicators for staff are all the lowest among the comparator libraries. Staffing levels (the number of paid staff and the staffing level per public service hour), MLS librarian staffing levels, and compensation levels all are the lowest of the comparator group. The following charts illustrate the gap for 2015; the Library has not improved its standing in 2016.

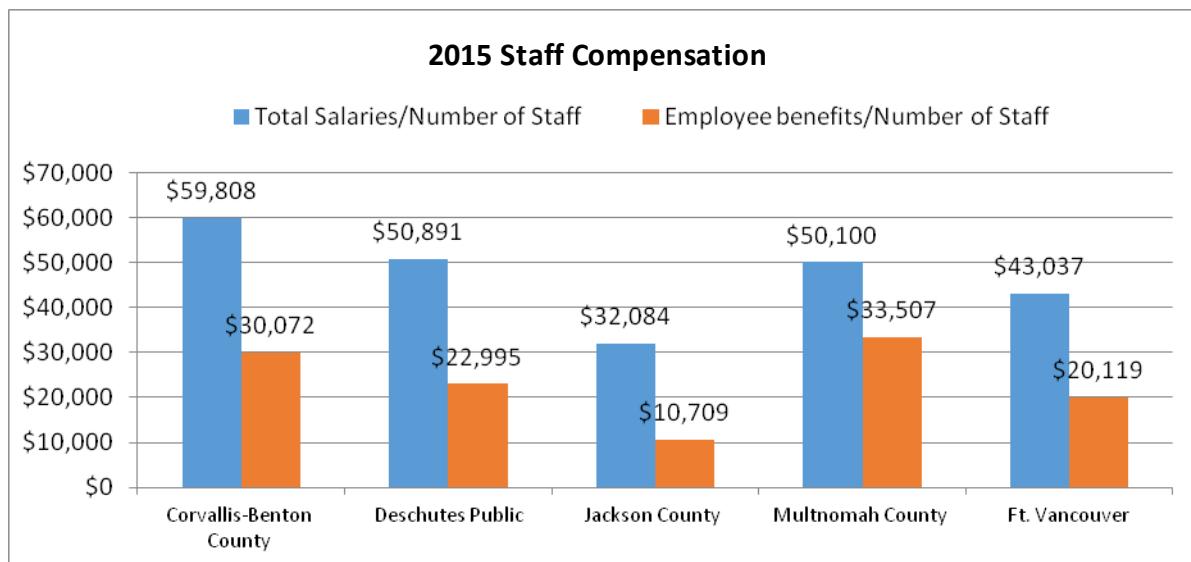


In 2016, staffing size (68 FTE) remained the same as in 2015 as did staffing per thousand residents. Staffing per thousand residents is exceedingly low; alarmingly so considering that the District has 15 locations and the second largest physical plant (total square footage) in Oregon, second only to Multnomah County Library.

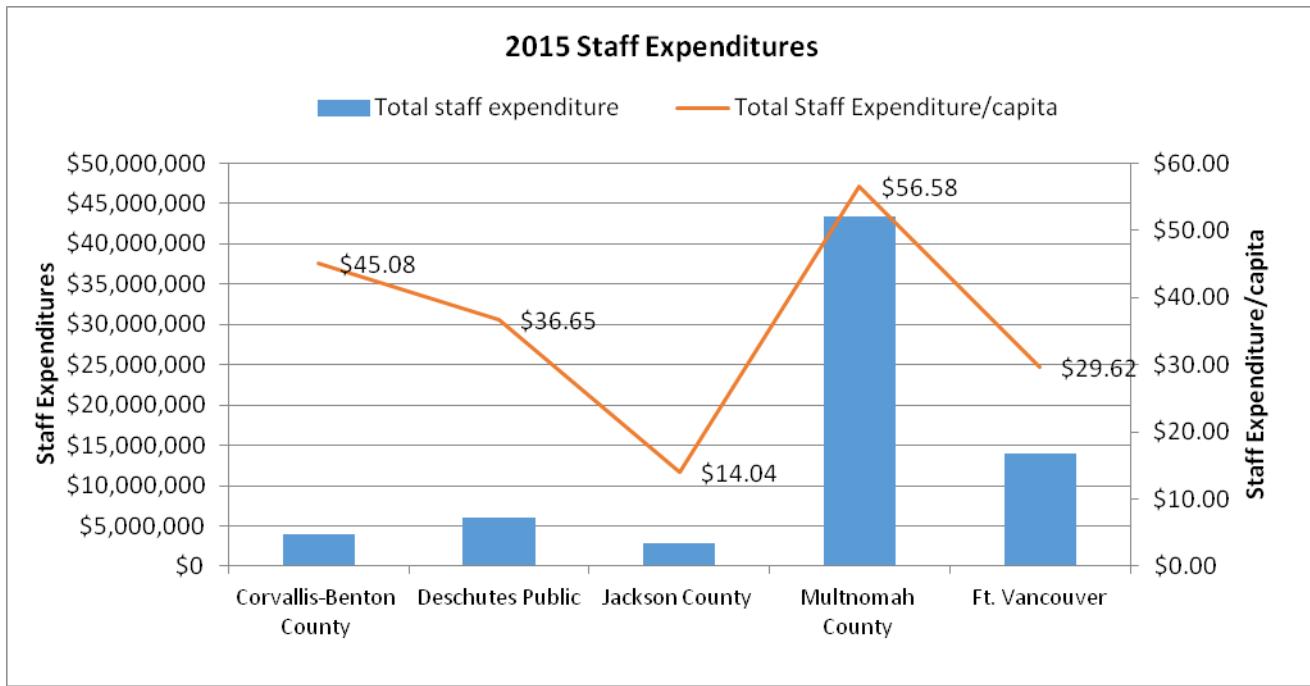




Professional librarian staffing levels are the lowest among comparator libraries in 2015 and 2016. Multnomah and Deschutes increased their librarian numbers and Deschutes' increase raised the librarian ratio to population of the service area.



Staff compensation in 2015 was the lowest among the comparator libraries. In 2016, staff compensation dropped, even though the number of staff stayed the same. The salary average dropped by 1% to \$31,705 and employee benefits by 8% to \$9830. The comparator libraries' salaries and benefits compensation increased, making the Library even less competitive than in 2015.



Expenditures per capita for staff were the lowest among the comparator libraries in 2015. In 2016, they dropped to \$13.69.

## Gap 2: Raising the Bar and Board Due-Diligence

LS&S is the employer. Staff costs come out of LS&S's contract amount. As the contract does not include staffing levels and compensation levels, LS&S is free to set them. According to the State Library Report, LS&S spent 56% of its FY 2014-15 contract (\$5,223,321) on staff salaries and benefits and 16% on the collection, leaving 28% for "other". We do not know if these reported costs include indirect or overhead costs. The Board could pay more money to LS&S and specify staffing levels and compensation, but the Board still would not know the true staffing costs and would likely pay additional overhead.

The lack of transparency makes it impossible for the Board to determine if it is getting good value for the dollar. The intent of the OLA Standards in this category cannot be achieved without an investment in staff. The issue for the Board is trusting that an investment through the contractor will be maximally used to achieve a complement of staff:

- to create and maintain programs and services integral to the mission of the public library in relation to its community;
- to provide equal, consistent, and quality service in a manner sustainable for the future;
- to provide uncompromising access to information;

- to possess the depth and breadth of knowledge necessary to provide quality service, for staff regardless of degree or position;
- to provide a staff with the education, training, and support necessary to identify and meet the needs of their patrons and community.

LS&S's definition of proprietary information is extremely limiting. This creates the problem that the Board cannot verify that the OLA Standards specifications are being met. In her appraisal of OLA Standards compliance, Dana Braccia indicated that 16 of the 28 (57%) essential specifications in the Staff category are met. We cannot corroborate that appraisal in the face of contradictory information and observations. For example, LS&S should be able to provide in its monthly report to the Board who has had training and the nature of the training. LS&S could set up and provide a report keyed to the certain of the OLA Standards.

## **Recommended Actions**

### **Near-Term 1: Agree to Performance Measures**

LS&S and The Board's LS&S Committee should agree to specific measures of performance that will help both entities track progress toward 100% of essential OLA Standards and agree to collect and report these to the Board as part of the Library Director's monthly report.

### **Near-Term 2: New Positions Should Advance OLA Standards**

Before adding positions, the Board should be satisfied that essential staff OLA standards are being met.

### **Far-Term 1: Meet Staff Essential Standards; Wait on Additional Hours**

Before adding hours, the Board should be satisfied that essential OLA staff specifications are met.

### **Far-Term 2: Know What Hours and Service Levels Are Sustainable**

The Board should develop a hypothetical future service plan and staffing plan and budget in order to understand the actual costs of operating the Library and what is sustainable given projected revenues and Board priorities.

# **MATERIALS**

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## **Intent**

Providing access to materials and information resources is integral to the public library. These standards address the importance of developing a collection of materials reflective of and responsive to the community. In addition to outlining a strategic approach to all steps related to material acquisition, access and assessment, the standards also acknowledge the need for a dynamic approach to technology as it impacts library collections. Beyond the need to provide access to both print and electronic resources as appropriate for the community served, these standards embrace the value added by collaboration and cooperation, from allowing for material requests from members of the community to engaging in resource sharing.

**Community Value –**The Library will obtain, organize, and make conveniently available to all the people of the community educational, recreational, and informational materials in convenient forms, including print, non-print and electronic. The desired outcome is that the community has access to items in a variety of formats reflecting a balanced collection.

## **Rating**

The Library meets 7 of 15 essential specifications in this category, or 47%. The collection needs improvement according to the Board, staff, and community.

## **Strengths**

The Library has a large collection, per capita, and the opportunity to hone the collection and to sculpt the collection to support its new Strategic Plan.

## **Gaps**

### **Gap 1: Collection Development Deliverables**

Library Management has recommended to the Board the addition of a Collection Development Librarian. Should the Board agree to such a position, it is very important to specify what this position will be responsible for accomplishing. The management team believes that the essential standards have all been met, but they have not. What will this position do if not raise the Library's collection performance?

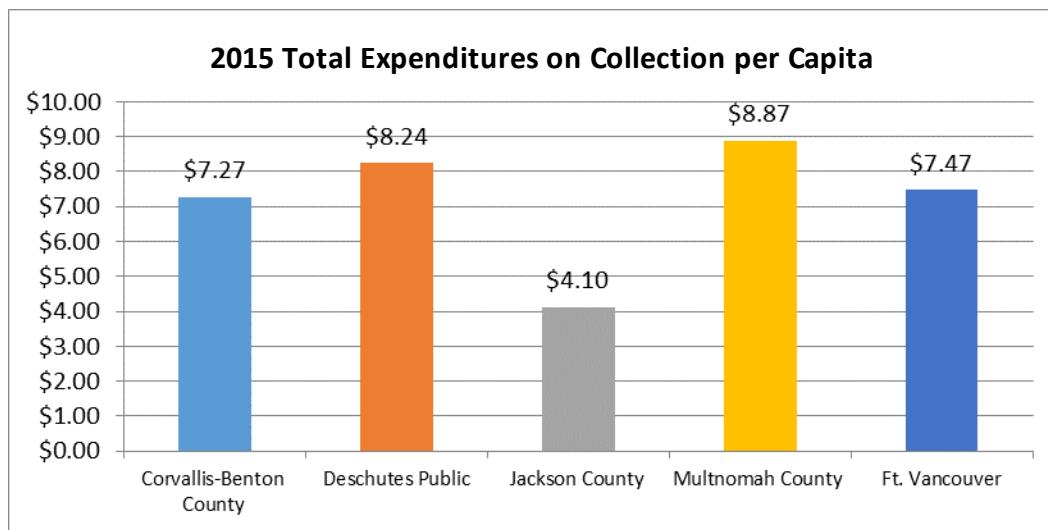
### **Gap 2: Collection Development and Management Plan**

There is no collection management plan and funds cannot be spent or the collection regularly evaluated according to a collection management plan if there is no such plan. A selection

policy which the Library has is not a collection management plan. There is a Legacy materials selection policy. This policy is based upon goals established in 1979. The collection does not adequately reflect the diverse interests of the community.<sup>3</sup>

### Gap 3: Collection Insufficiencies

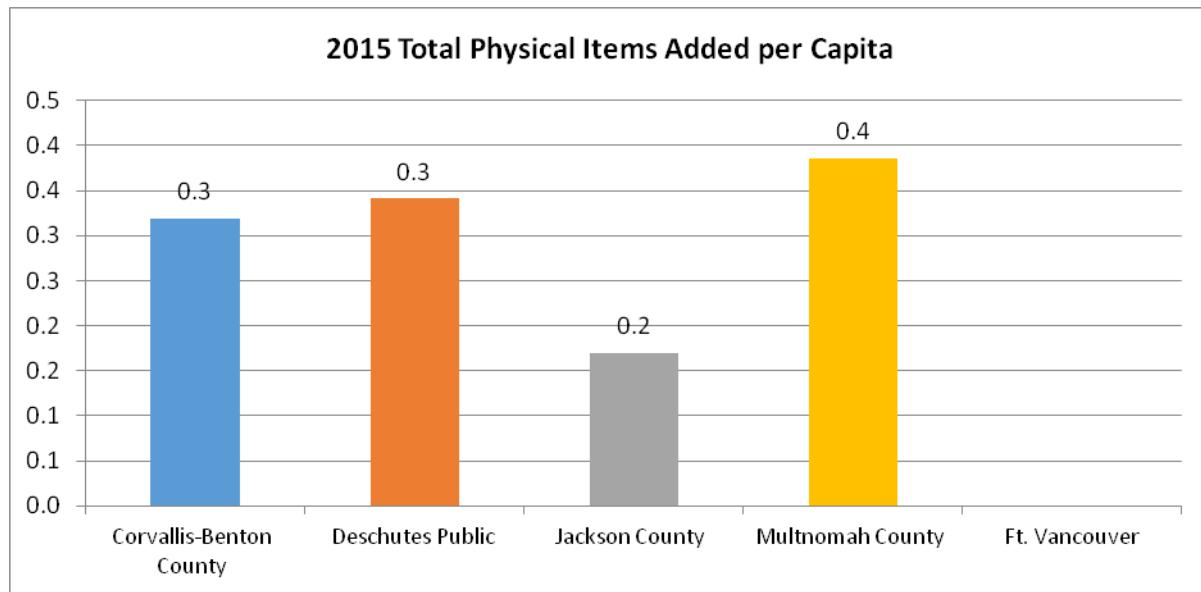
The collection is quite large but expenditures are low per capita and have been for a decade. Items added per year have been low and we understand that collection maintenance has been deferred for lack of staff. The collection is likely dated and needs revitalization. The low per capita circulation is one indication; another is the low turn-over rate. The following charts illustrate how the Library compares.



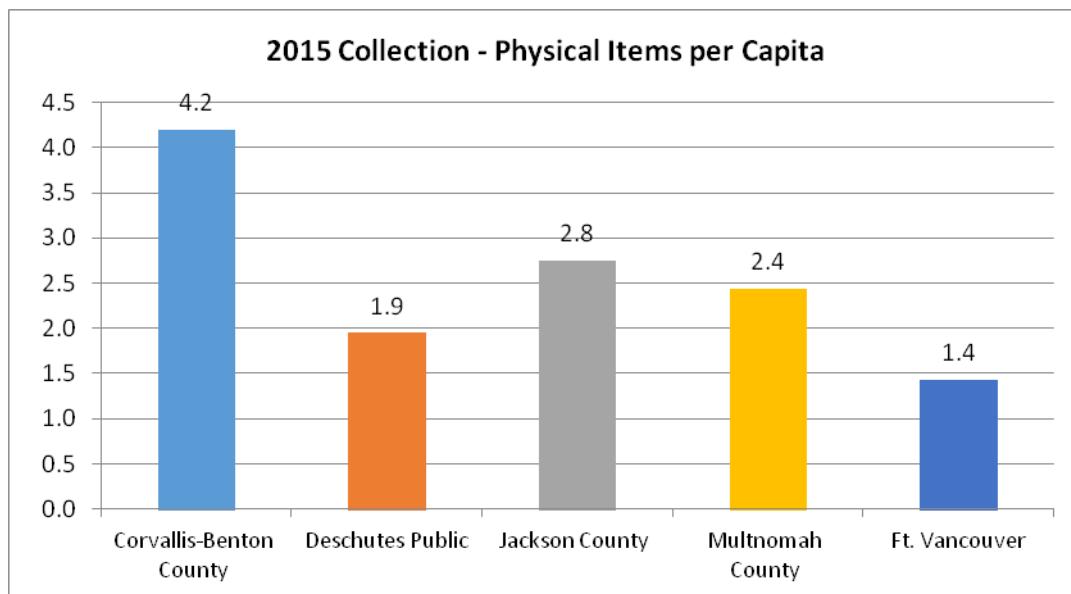
Expenditures for materials are very low - \$4.10 about half that of comparator libraries. In 2016, the per capita expenditures dropped to \$4.09. Spending on collections dropped by \$10,505 to \$844,522.

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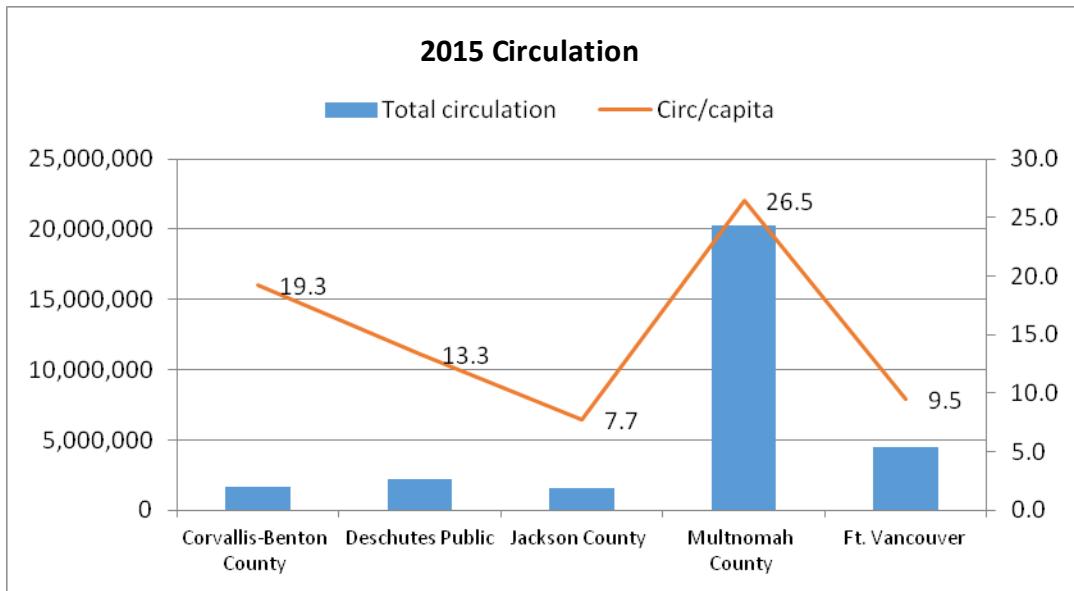
<sup>3</sup> Jackson County has a Hispanic population of 12.4%, according to the last Census. 9.4% do not speak English at home. According to JCLS' latest statistical report, there are 573,731 physical items in the collection. A general search of all holdings – print and non-print -- revealed approximately 3,787 Spanish language materials. It was hard to find Spanish language books that are not just English language books translated into Spanish. Only one Spanish language database. No Brainfuse, Cypress Resume, Acceda Noticias in Spanish. No copies of Pura Blepere Award winners. Audiobooks: 99.9% English. Feature films: 6,331 English vs 291 Spanish.



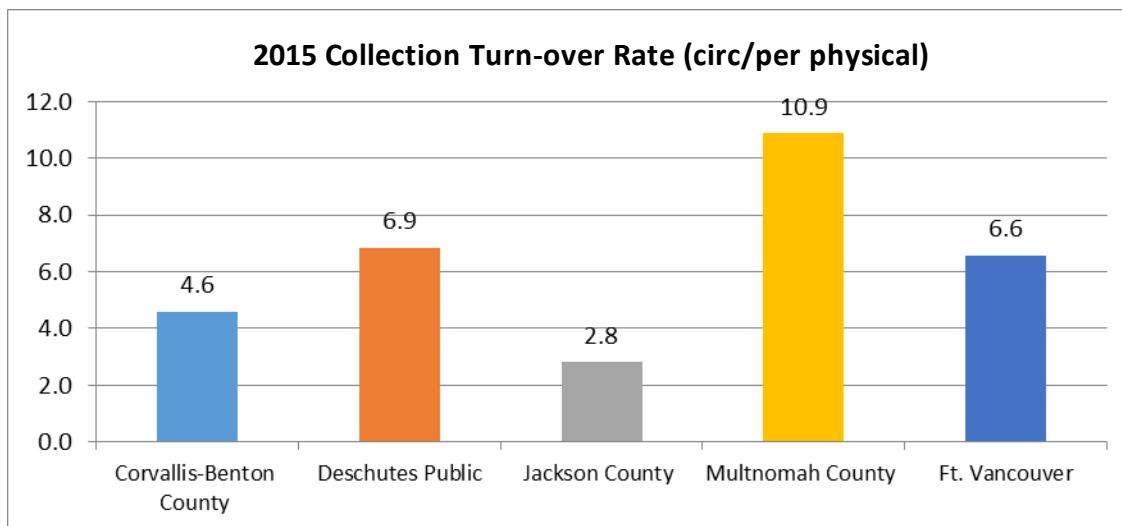
Physical items added in 2015 was the lowest among the comparator libraries. In 2016 the per capita addition of physical items remained at the same rate.



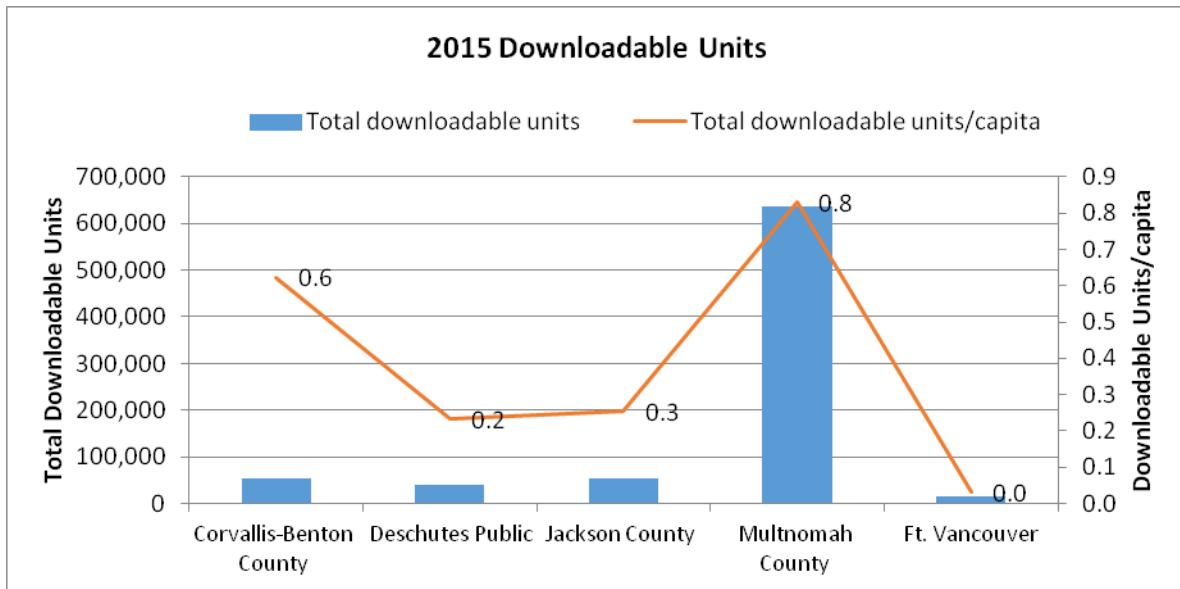
The Library's collection, which is quite large per capita, must be aging rapidly. Low circulation numbers and low collection turnover rates support this probability. 2016 physical collection items per capita dropped to 2.7. We assume this is due to weeding: total collection items dropped by 11,499 in 2016.



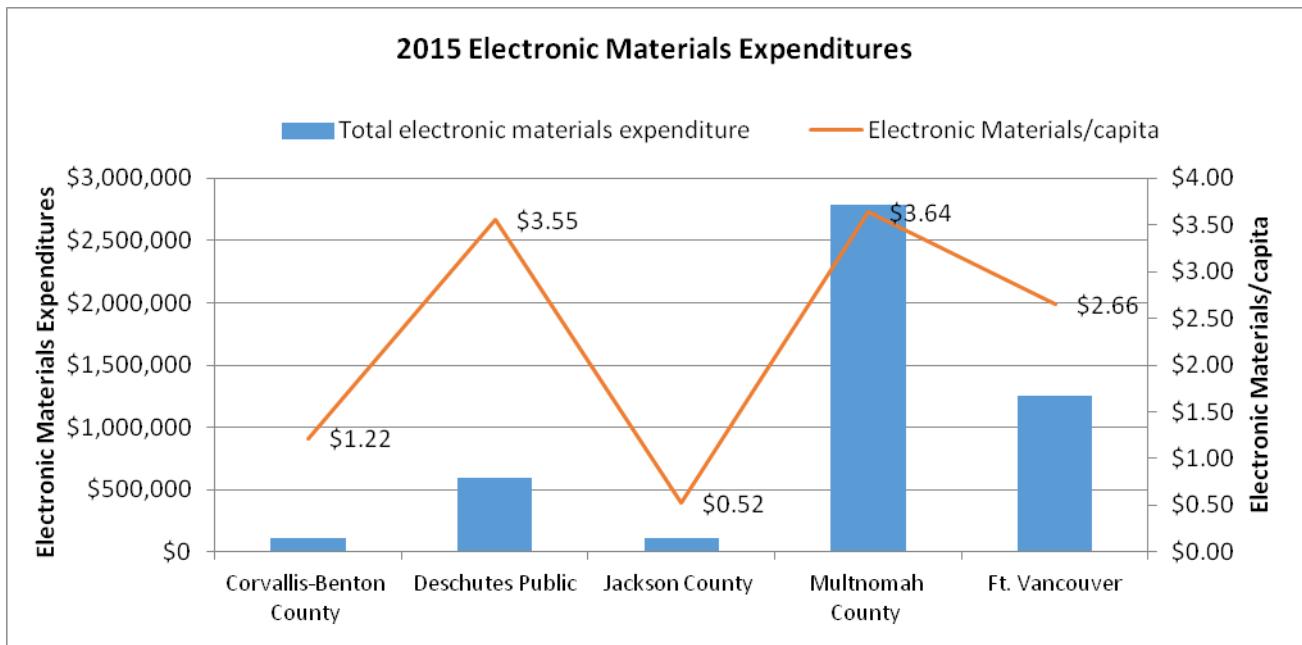
The Library circulates 7.73 per capita, compared to 13.33 at Deschutes, 19.26 at Corvallis, and 26.47 at Multnomah. (2015-16 figures look better, but we are awaiting a full set of data). Circulation per capita rose by 24% to 9.6 per capita. The comparator libraries stayed about the same as 2015.



Turnover rate is an industry measure for gauging the relevance and appeal of the collection to the community. The turnover rate is calculated by dividing the total collection items by the annual total circulation. It is one indication of collection vitality. The turn-over rate improved for the Library in 2016 (3.5)

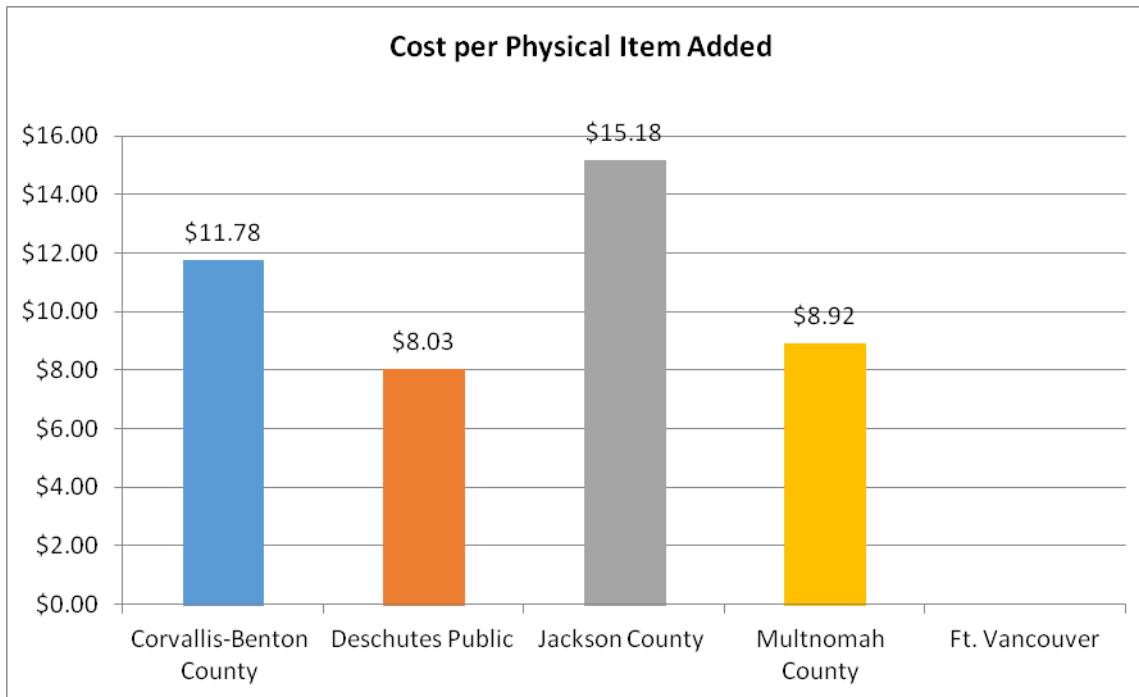


The basic digital collection, consisting primarily (not quite solely) of resources shared across the State, does not make up for low collection expenditures. Total downloadable units per capita remained the same in 2016.



Electronic materials spending per capita rose in 2016 to \$0.63 per capita, an increase of 21%; comparator libraries' spending per capita increased by about the same percentages.

One would think that LS&S would be able to negotiate economical volume contracts with OverDrive, Hoopla! etc., as well as subscription databases. It would certainly benefit the Library to have access to more, newer materials.



The chart above shows the 2015 cost per physical item added which was higher for the Library than any of its comparator libraries. In 2016, the cost per physical item added dropped to \$13.15, but it remains the highest of the comparator libraries.

Procurement and processing procedures may have been streamlined but in RMA's walk-through of the Medford Library, boxes of books were sitting unopened for lack of the regularly scheduled staff to open and check them in.

## Recommended Actions

### Near Term 1: Collection Development Deliverables

Establish collection development deliverables tied to the OLA Standards and the Strategic Plan.

## **Near Term 2: Collection Development and Management Plan**

Create a collection development and management plan based on best-practices.

## **Near Term 3: Improve Collection Performance**

Increase the number of items added and weed the collection according to the collection development and management plan. Review circulation policies, ensuring policies and procedures maximize the potential for use of the collection.

### **Best Practices Tools**

A collection development and management plan is broader in scope and depth than the more narrow materials selection policy. A collection development and management plan should be more than a statement of policy and procedure; it should also profile the collection by subject area and by branch location and describe a direction for the development of the collection as a whole and of sub-collections, including special collections. The plan should speak to levels of development and how the collection will be evaluated and kept relevant. The plan should be reviewed and revised regularly.

For a best-practices example and an illustration of content and how to structure a collection development plan, view Multnomah County Library's plan. This plan is provided for illustrative purposes; it could be scaled to the Library for its purposes.

<https://multcolib.org/sites/default/files/2016-Collection-Development-Manual.pdf>.

## SERVICES AND PROGRAMS

### **Intent**

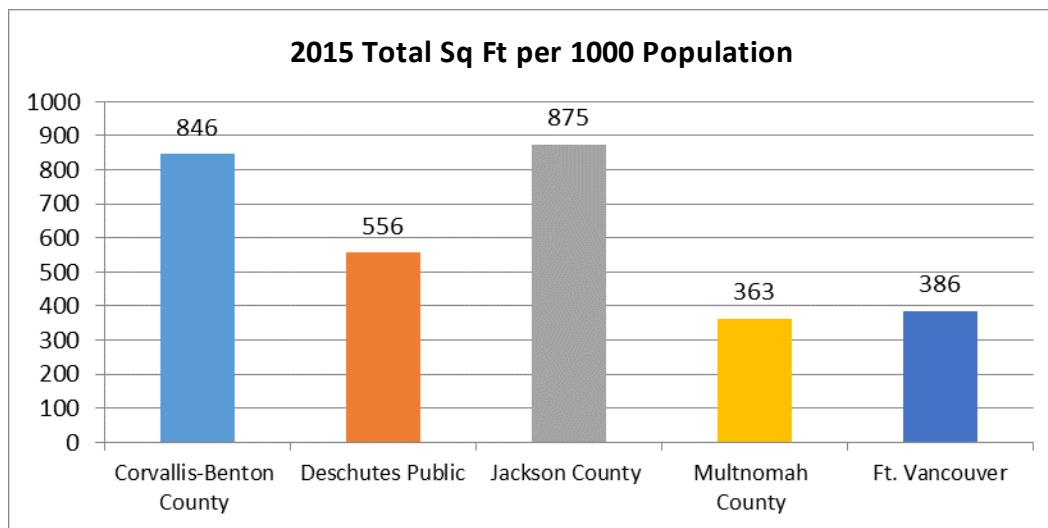
Services such as reference, reader's advisory, and services to youth are an integral component of library services and should be available whenever the building is open to the public. The public library develops and offers educational, recreational and cultural programs designed to best meet the diverse needs and interests of their individual communities. Services and programs are offered free of charge to everyone in the library's service area and are continually evaluated to assure they are effective. Alternate methods of delivery of service need to be explored and provided for populations unable to come to the library facility.

### **Ratings**

The Library meets 6 of 11 essential specifications in this category, or 55%.

### **Strengths**

The 15 facilities themselves, all of which are new in the last decade are the system's greatest strength. For every community in the County, with the exceptions of Ashland and Medford, the libraries are the main civic space. The Medford Library is a spacious and well-appointed public library and civic space. The shared use of the facility by the Rogue Valley Community College is an outstanding example of cooperation and collaboration and the leveraging of resources. The number of facilities is necessary to serve the residents of County. With its 2800 square miles, Jackson County is the 13<sup>th</sup> largest county in Oregon and the third largest library jurisdiction with a service population larger than any other than Multnomah County and Salem.



## Gaps

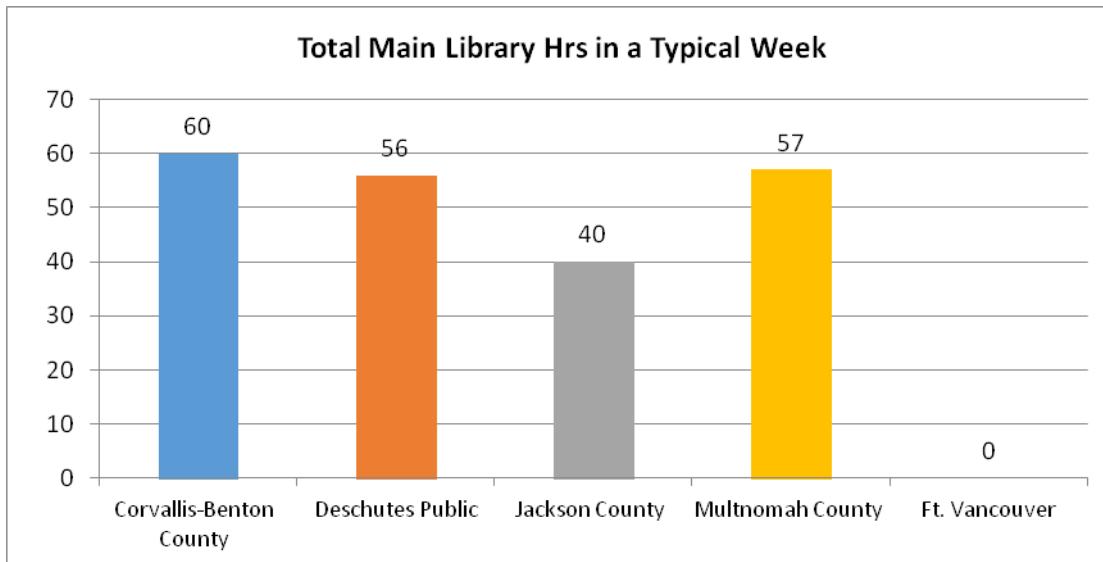
### Gap 1: Sub-standard hours

The following table shows the hours at each location and indicates whether the location meets or is below the essential OLA Standards. The shaded, right side of the table shows the OLA Standards at the essential, enhanced, and exemplary levels. The unshaded, left side of the table shows the population, hours, and rating of each location according to the OLA Standards.

	JCLS	Service-area population <sup>4</sup>	Hours per week 2016/17 budget document	Standards level 2016	OLA Standards Population Served	Essential	Enhanced	Exemplary
1	Applegate	1,366	16	Below	0–4,999	20	35	50
2	Ashland	25,086	40	Below	5,000–9,999	30	45	60
3	Butte Falls	1,297	10	Below	10,000–24,999	40	55	70
4	Central Point	26,518	36	Below	25,000 +	50	60	75
5	Eagle Point	11,850	28	Below	Compiled by RMA			
6	Gold Hill	5,153	18	Below				
7	Jacksonville	5,154	24	Below				
8	Medford	83,670	40	Below				
9	Phoenix	10,178	22	Below				
10	Prospect	1,024	12	Below				
11	Rogue River	9,618	28	Below				
12	Ruch	3,802	18	Below				
13	Shady Cove	6,307	18	Below				
14	Talent	8,654	36	Essential				
15	White City	10,408	22	Below				

Only one of 15 branches meet the essential standards for hours of operation. Nine branches are sub-standard. The highest number of unduplicated hours in the System is 40 hours at Medford. The Library increased the total number of public service hours (hours open throughout the System) by 9% in 2016, from 17,090 to 18,617. However, these hours are spread across 15 locations. Compared to the other libraries, the Library is open an average of 1,221 (2015) and 1,330 (2016) while Deschutes with its five branches, is open 3,274 (2015 and 2016), nearly three times as many hours per location. A 40-hour work week is 2080 hours. Deschutes is open an average of 57 hours per week at each location.

<sup>4</sup> The service area populations are from the “Jackson County Library Strategic Planning big data from Analytics on Demand” PowerPoint slide presentation, March 14, 2016. The service areas for each location and the associated numbers were established with the Board’s assistance and concurrence.



The Library's main branch, Medford, is open the fewest hours among the comparator libraries. Fifty hours per week is the essential standard for the Library.

### **Gap 2: Inconsistencies across the system**

It appears that reference, reader's advisory, and services to youth are integral to the service program and easily available at the Medford and Ashland locations, but not all locations.

### **Gap 3: Fees**

Services appear to be offered free of charge except that interlibrary loan carries a handling fee, whether or not the requested item is provided.

### **Gap 4: Services Evaluation**

Services evaluation is not evident. Patron feedback mechanisms are not evident. Library Management says there is a suggestion box in every library, that suggestions are addressed by the branch manager first, then referred to Library Management. The patron gets a direct response if he/she leaves contact information. It is not clear what Library Management does with the input and feedback on a global scale. There appear to be no structures in place to get input and feedback from those patrons not able or inclined to visit the Library. There appear to be no structures in place for non-patron input.

### **Gap 5: Programs**

Board input suggests that the programming may not align with the strategic plan focuses. Program numbers have increased but seem to be generated by staff wanting to do them, yet feeling understaffed to do so. The programs seem not to be the product of thoughtful

consideration of the Strategic Plan, formed to support specific and quantifiable deliverables attached to Strategic Plan goals and measures.

### **Gap 6: Diverse Needs**

Meeting the diverse needs of the community is not evident for the 12% of residents that speak Spanish in the home. There is Outreach to the Homebound, Large Print and audiobooks. The website has a tab to increase the text size. However, services and programs to people with disabilities is not evident through the website.

### **Gap 7: Patrons with Disabilities**

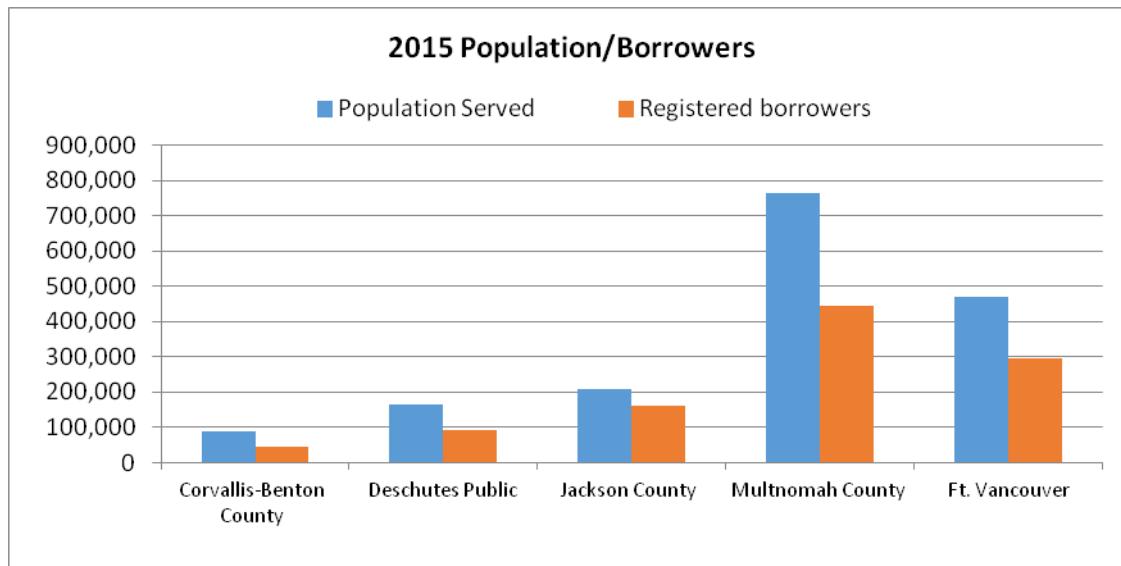
Reference and readers advisory to patrons with physical disabilities in formats they can utilize is not evident.

### **Gap 8: Trained staff**

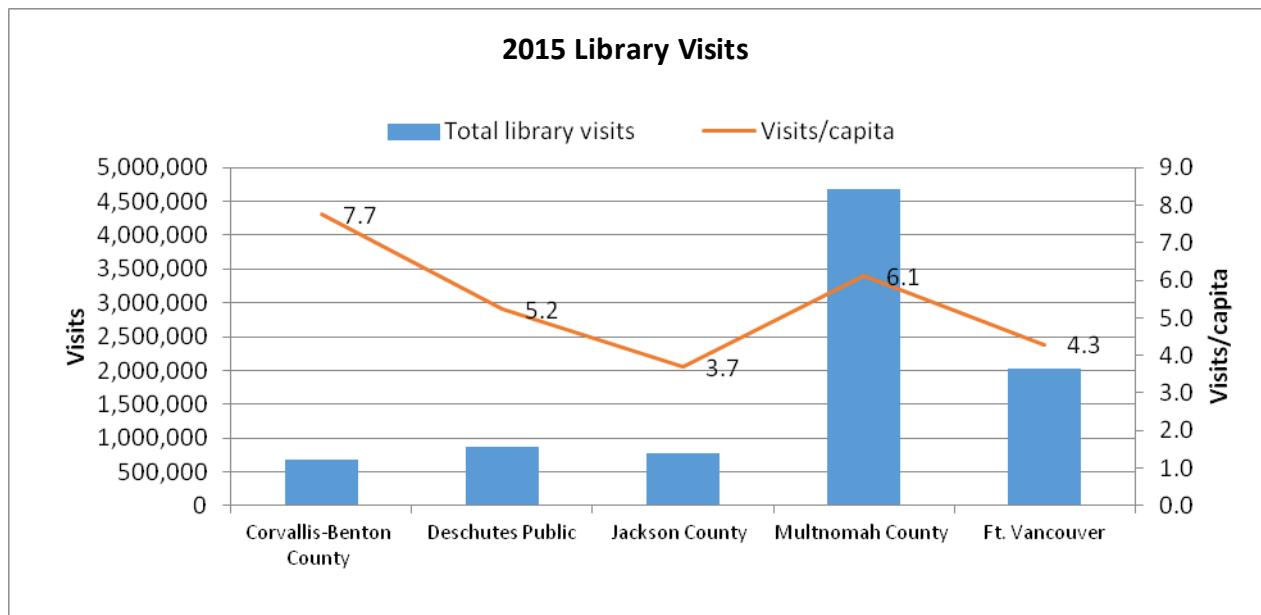
There is a series of three basic skills classes being offered for patrons, so one assumes trained staff are teaching those units. However, based on comments of Board members and the Edge Assessment, technology expertise among staff is generally low, there is not much opportunity for staff to receive formal technology training, and the ability to help patrons with technology and database is inconsistent between locations.

### **Gap 9: Use of the Library**

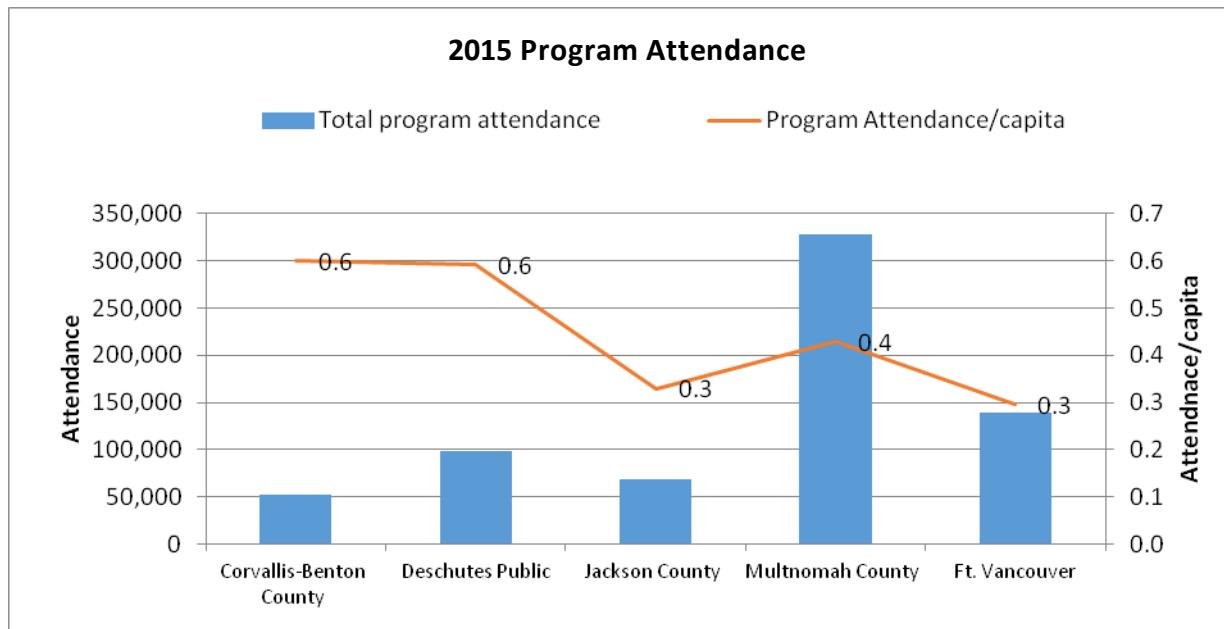
The percentage of resident cardholders in the District is comparatively high. However, use indicators are the lowest of the comparator libraries. This is likely due to a combination of factors including the low number of hours, an aging collection, the low staffing levels and staff time to promote the Library through strategic marketing, communication, and outreach to various segments of the community. The following charts compare borrower, library visits, program attendance, and Internet public computer use.



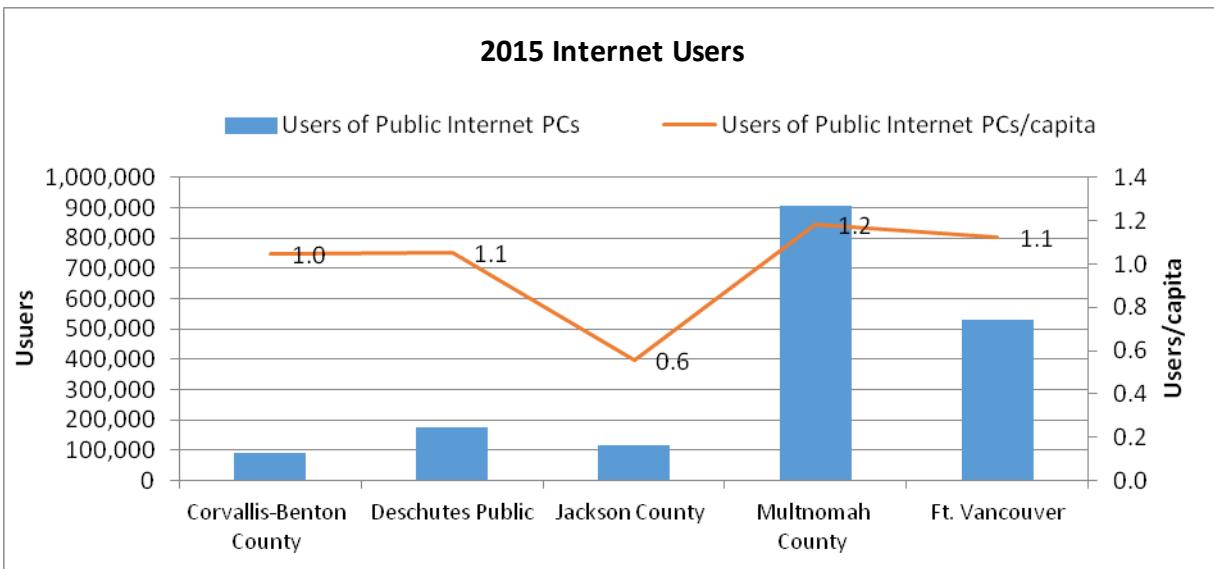
In both 2015 and 2016, the percentage of registered cardholders<sup>iii</sup> is relatively higher in Jackson County than comparator libraries (77%) compared to a range of 55%-63% for the comparator libraries. The reliability of the number of cardholders is in dispute between Library Management and the Board, the Board not trusting the numbers based on experience and customer's anecdotal feedback. The percentage for the Library does seem unusually high and given the hours and other use-level indicators, we recommend that the Board and the Library Management resolve this question right away. Getting this right is important to the Board and should be a priority of Library Management.



The number of library visits in 2016 (770,677) and the number of library visits per capita (2016 = 3.6 per capita) declined in 2016 compared to 2015. It is likely that low hours contribute to the Library's relatively lower usage levels: library visits, program attendance, and computer sessions as well as circulation. As previously noted, the circulation rate is also affected by the collection quality. However, these indicators point to the need for strategic marketing and targeted outreach, functions that require the expertise and availability of staff that are not tethered to the branch.



The number of programs and program attendance (0.5) has increased in 2016. However, the issue remains that programming needs to be approached in a focused way, support the Strategic Plan goals and deliverables; these have not been determined at this point and need to be a priority of Library Management.



Use of public computers for access to the Internet has remained the same per capita in 2016. The Library may have too few computers (.08 per thousand population) compared the 1.0 and higher among the comparator libraries. However, with 15 branches and .05 computers per thousand, Ft. Vancouver Library still has a higher use rate than the Library. This suggests that hours and promotion are at issue.

## **Recommended Actions**

### **Near-Term 1: Service Level Parity; Insure Patron Database Accuracy**

Library Management should document in its report to the Board what are the current services being provided at each local branch with the intent of understanding service levels and parity across the Library System. Library Management should work with the Board to clarify the patron database accuracy.

### **Near-Term 2: Service Plan**

Library Management should document what is and what will be the service plan across the Library System for serving the Latino population and residents with disabilities.

### **Near-Term 3: Strategic Plan-Driven Programming**

Library Management should propose a Program Plan that is tied to the Strategic Plan deliverables.

### **Near-Term 4: Interlibrary loan fees**

The Board should revisit its policy on interlibrary loan fees.

## **Far-Term 1: Services and Programs Plan**

The Board should develop a future-oriented, sustainable services and program plan and budget for the District. Determine the sustainable service hours in the Board's service plan and increase hours if possible.

## **TECHNOLOGY**

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### **Intent**

The OLA technology standards have borrowed heavily from the Library Edge Initiative which is a best-practices framework being widely adopted by the public library community throughout the nation. The framework has three main subcategories:

1. Community Value and Support: external practices that connect the library to the community, with the goal being that staff and volunteers provide assistance and training that increases the level of digital literacy in the community.
2. Engaging the Community and Decision Makers with specific programs, services, and support that enable people to get value from their use of technology.
3. Organizational Management such that the library manages resources so that community members who want or need access can readily get it regardless of ability, skill, or available time.

The OLA technology standards have been simplified to the point of providing a very broad summary of technological competences, while the Edge Initiative provides a detailed, fine-tuned assessment. It is quite possible for a library to perform well against the OLA standards and perform poorly against the Edge Initiative, and in general the latter should be considered to provide a more accurate assessment given its level of detail.

In evaluating the Library's performance, we relied not only on the project team's assessment, but also on the Edge assessment results, public library statistics published by the State of Oregon, and our own inspection of the Library's website. In some cases, we answered "no" where Library Management answered "yes", in part because we felt the other sources justified a "no" because we felt the Library did not broadly or consistently meet the standard. For example, Library Management has a technology plan, one of the essential specifications; however, the plan has not been approved by the Board due to a controversy between the Board and LS&S regarding the direction of that plan.

### **Rating**

The Library meets 5 of 14 essential specifications, or 36%; the dashboard breaks out the ratings in the three sub-categories noted above.

## Strengths

Polaris, the shared Integrated Library System (ILS) hosted and managed by LS&S, is a high-quality ILS with very high ratings in Marshall Breeding's annual customer satisfaction survey. In the 2015 survey (<https://librarytechnology.org/perceptions/2015/>), Polaris received top ratings among large public libraries for general satisfaction, ILS functionality, print functionality, and electronic functionality. The ILS appears to be well-managed and supported by LS&S.

The Library participates in statewide subscription databases, the Library2Go Overdrive collection of eBooks and audiobooks, and Hoopla! streaming video and audio content. This provides a good core collection of electronic resources and downloadable content.

The Board has chartered a subcommittee to plan and prioritize technology projects, and the subcommittee reports to the Board on a regular basis. Technology projects are included as line-items in the annual budget.

## Gaps

### Gap 1: Library Technology Readiness and the Strategic Plan

The Edge Assessment Report and other sources show a number of areas in which the Library must invest in order to meet the requirements of the Strategic Plan. It is concerning that Edge Assessment scores actually declined between March 2014 and May 2016 in many areas. Do we have an explanation for that? Is it just a result of a different person answering the questions subjectively, or has there been an actual decline in services in that time period? Of most concern is the decline in digital literacy support and staff expertise. The Library lags its peers significantly in these areas.

Benchmark	Points Achieved	Peer Average	Points Possible
1. Digital literacy	40	49	75
8. Staff expertise	15	60	80

The Strategic Plan implicitly and explicitly mandates the development of technology resources and expertise. Supporting education priorities, educating for digital literacy and marketable workplace skills, implementing new models to improve information access and delivery: these all require sophisticated technology infrastructure and a high level of technology expertise among staff.

### Gap 2: Internet Bandwidth; Routers

Also of concern is that the Internet bandwidth reported in the Edge assessment shows much lower measured speeds than contracted speeds. Routers are needed as well. While the contracted bandwidths are sufficient for the number of simultaneous users a library might need

to support, in some cases the measured bandwidth is insufficient. Whether there was a measuring error, or internal infrastructure limits the actual measured speed, or the Internet Service Provider is greatly underperforming its contract, the Library should resolve the discrepancy and adjust its Edge assessment answers based on real bandwidth values.

### **Gap 3: Limited Technology Readiness**

The Library is largely limited to basic technology support, due to limited staffing, limited training, and partially obsolete technology. Development of a technology plan, funding for specialized technology staff and technology training for all staff, and replacement of older equipment and software is needed in order to improve technology support. The current projects to replace all public computers, install new wiring and WiFi access points at all locations, and add a print management solution are a good start. But a significant investment in staff must be made in order to leverage new technology.

## **Recommended Actions**

### **Near-Term 1: Technology Plan**

Develop a Technology Plan closely aligned to the Strategic Plan and that meets OLA Standards at all levels. The Technology Plan should encompass programs and services to patrons, training and support of library staff, and allocation of funds for regular replacement of computers, network equipment, and other technology assets. The scope of a Technology Plan is typically three years, reviewed annually and revised as needed.

### **Near-Term 2: Raise the Bandwidth Bar**

Measure current bandwidth at each Library location and identify discrepancies with the Internet provider's contracted bandwidth allotment. Where measured bandwidth is lower than contracted bandwidth, identify and correct local infrastructure constraints that limit bandwidth. Review and if necessary renegotiate vendor service level agreements to ensure the Library receives the bandwidth it is contracting for.

### **Near-Term 3: Staff with Technology Expertise**

Recruit and add staff with technology expertise who can support patrons with technology issues, teach higher-level technology classes, and create and manage new programs and services focused on or supported by technology.

### **Far-Term 1: Advanced Technology**

When technology infrastructure and staff competencies are well established, identify advanced technology services or programs that meet the needs of the communities: a makerspace, an instructional coding lab, an oral history recording studio, a digitization project, etc.

## **Best Practices Tools**

We provide two technology plan examples below with links. The former is the product of a full-scale planning process and the latter is the product of an abbreviated process.

Santa Cruz Public Library

The Santa Cruz plan most closely shows best practice - it is the product of a comprehensive strategic process, it is clearly linked to the library's strategic plan, and it has measurable goals and objectives.

[http://www.santacruzpl.org/media/pdf/lipb/SCPL\\_Tech\\_Plan\\_FINAL.pdf](http://www.santacruzpl.org/media/pdf/lipb/SCPL_Tech_Plan_FINAL.pdf)

Crook County Library:

<http://www.crooklib.org/Portals/28/About%20Us/Policies/Technology%20Plan%202014-2017%2007.2015.pdf>

The Crook County plan shows an abbreviated process, but is clearly linked to the strategic plan and has some clear goals and objectives. It is a good plan for a library with limited resources to do a full planning process.

## **ADVOCACY**

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### **Intent**

It has never been more important for librarians, staff members, trustees, and others with a vested interest in their public libraries, to convey to their communities the value of the library. Advocacy, the process of acting on behalf of the public library to increase public funds and ensure that it has the resources need to be up to date, is critical to the success of libraries. The goal is, through effective community relations, to increase awareness and support of library services. The Board and staff play a critical advocacy role.

### **Rating**

The District is solidly meets 2 of 12 essential specifications, or 17%, in this category.

The specifications want the Board, staff, and other advocates to work locally and with others to advocate for broader access, useful legislation and a robust information infrastructure. They want the Library to be staffed and supported by people who are educated and empowered to effectively advocate for their organizations, their communities and the information profession.

### **Strengths**

The fact that there is a Library District in Jackson County is a clear indication that advocacy in the District is very strong. The Board members are highly credible in the community. Board members are active in Friends and Foundation. The Board members are known and respected in the community. Their credibility is a valuable asset. LS&S is currently recruiting a Library Marketing Coordinator.

Board members are doing the most in meeting these specifications. However, the Board members cannot be expected to do all that needs to be done. The Board gets high marks for local library advocacy; the launching of the District, the strategic planning process, the collaborations, and the community's high level of confidence in the Board are all evidence of the Board's advocacy capacity.

### **Gaps**

#### **Gap 1: Formal Board Structure; Adopt Advocacy Policy**

While Individual Board members are active and effective advocates, the Board lacks a formal, structural framework for knowing about and working across jurisdictions, in the State, and nationally. We acknowledge that the Board has had little time for this, but this is something the Board could begin to gear up to do by creating an advocacy committee, or incorporating into an

existing committee these broad responsibilities: to be informed of OLA and ALA legislative issues and champion those issues whenever possible; to be advocates for improved library service at the local, state, and federal level; to participate in statewide campaigns that focus on public awareness of libraries in order to garner support and funding; to participate when critical legislative issues arise that affect the future of libraries; to build and nurture strategic relationships with other community organizations in support of common goals. The Board should adopt an Advocacy Policy and Library Management should develop the policy content for the Board, under parameters developed by the Board.

## **Gap 2: Unspecific Deliverables**

What Library Management is doing in this category is unspecific. The OLA Standard's specifications call for Library Management to provide information and training to all library staff regarding the impact of customer service and marketing on the library's image and community relations. They call for staff and supporters to be dedicated to the marketing and advocacy initiatives of the library, to serve as representatives on behalf of the Library, promoting its use, encouraging its development, and enhancing communication between the library and the public. These are the specifics that Library Management should emphasize along with educating staff and supporters so that they can develop and nurture a community of advocates. Advocacy for the Library should not be confused with promotion and marketing of LS&S.

Library Management has a critical role in achieving this specification: "our libraries will be staffed and supported by people who are educated and empowered to effectively advocate for their organizations, their communities and the information profession." The specifications are:

1. Staff and supporters are dedicated to the marketing and advocacy initiatives of the library.
2. Staff and supporters serve as representatives on behalf of the library, promoting its use, encouraging its development, and enhancing communication between the library and the public.
3. Staff and supporters develop and nurture community stakeholders and educate with the goal of being advocates.
4. Library provides legal and state election law training to staff and supporters.
5. Library provides support and resources to staff and supporters to ensure that they can be successful advocates.

## **Gap 3: Library Director Role**

The importance of the Library Director as a partner with the Board in advocacy cannot be overstated. The focus of that advocacy must be first and foremost at the local level, with attention to state and national issues of mutual importance increasingly in the Board's awareness.

## **Recommended Actions**

### **Near-Term 1: Establish Deliverables and Measurable Outcomes**

The Board and Library Management should establish true “deliverables<sup>iv</sup> and measurable outcomes for the Library Marketing Coordinator that emphasize the applicable OLA Standards specifications for Advocacy and the Strategic Plan actualization.

### **Near-Term 2: Marketing Plan**

The work of the Library Marketing Coordinator should be based on a marketing plan. The marketing plan should have measurable outcomes. The plan should be reviewed and approved by the Board.

### **Near-Term 3: Advocacy Committee of the Board**

The Board should consider establishing an advocacy committee, with a charter that emphasizes the OLA Standards and the Strategic Plan.

### **Far-Term 1: Advocacy Priorities**

The Board should develop, in conjunction with the Library Director and the advocacy committee, advocacy priorities for the District, including a budget to support those priorities.

## **Best Practice Tools**

This marketing workbook is from the New Mexico State Library. It is a tool for creating a marketing plan. It uses language from the PLA Planning for Results strategic planning model on which the Library's strategic planning model seems to be based.

[http://www.nmstatelibrary.org/docs/development/planning/Marketing\\_Plan\\_Workbook.pdf](http://www.nmstatelibrary.org/docs/development/planning/Marketing_Plan_Workbook.pdf)

Buffalo, NY

<https://www.buffalolib.org/sites/default/files/pdf/AboutTheLibrary/Marketing%20Plan%202015-2016%20Final%202014-45%20APPROVED%2012-19numbered.pdf>. The executive summary talks about their deliverables: increase use at each library and drive people to their website.

Montgomery County, MD.

<http://montgomerycountymd.gov/Library/resources/files/about/marketingplan.pdf>

Key words in the executive summary “Refresh Revitalize Renew Rededicate = deliverables not responsibilities.”

# **FACILITIES**

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## **Intent**

Library facilities should provide the physical space where residents can connect to people, ideas, and information. They should be safe, comfortable, efficient, welcoming and allow for flexibility of space, service, growth, and community priorities.

Library facilities should be reflective of an ongoing community assessment process. Libraries may partner with other community organizations to provide space for certain activities. Libraries should consider regional availability of similar services when figuring space needs.

Ultimately, each library must consider and reflect their community as the unique entity it is. OLA encourages library leaders to consider excellence in facilities by looking at best practices and the facilities of those libraries succeeding at providing, meeting and surpassing community needs.

The OLA Standards Facilities specifications are organized into six sub-categories:

**Community Anchor:** Community recognizes library as a cultural capital and a symbol of civic pride; community members take pride in their library facility.

**Legal:** The library is an entity which leads by example, provides a safe, comfortable environment and is responsive to the community.

**Design:** All who enter the library find a pleasing space suited to their needs and wants; the building serves the current and future needs of the community well; the building supports services and programs for lifelong learning, from pre-natal throughout all stages of life. Technology has not reduced the need for library space; library traffic grows in spite of and because of technology.

**Technology:** The building supports ever-evolving technology services which support community members' needs.

**Assessment/Planning:** The library provides adequate space to implement the full range of library services that are consistent with the library's strategic plan, current community needs based on on-going assessment, and the standards in this document.

**Partnerships/Collaboration:** Partnerships foster community investment in a cooperative environment and the community benefits from collaborative spaces.

## **Rating**

The District meets 9 of 18 of the essential level specifications in the Facilities category; overall this is 50%. The dashboard breaks the rating into its sub-categories, where the District rates variously between a low of 25% and a high of 75%. It is important for the Board to focus it's planning for facilities, especially post-2020 when the District will take over the facilities' ownership from the County.

## **Strengths**

As previously noted, the 15 facilities themselves, all of which are new since 2004 – 2007, are the Library's greatest service. For every community in the County, with the exception of Ashland and Medford, the libraries are the main civic space. All but Butte Falls has a community meeting room.

## **Gaps**

### **Gap 1: Ready-Availability**

In the sub-category, Community Anchor, the District meets 1 of 2 essential specifications, or 50%. The JCLS branches are community anchors and the source of community pride. However, while community and cultural activities take place in the branches and library services are available to all residents of the service jurisdiction, the hours of service, training, and service levels suggest that they are not "readily" available.

### **Gap 2: Legal Requirements**

The rating for this sub-category is 33%. Board members think the buildings comply with all federal, state and local codes, including safety, parking and ADA compliance. However, this would be worth reviewing as the Board undertakes capital improvement planning. We could not find that the Library has adopted an Emergency Plan for the facilities. According to Board members, there may not be adequate space in some facilities for staff duties and activities. Library Management indicates there is a clutter problem in some locations.

### **Gap 3: Design and Technology**

We combined the ratings for Design and Technology sub-categories in the dashboard because they seem to go together. Specifications needing attention in these sub-categories may be being addressed by the Board in its capital improvement committee work. We rated the Library "no" in the following specifications because they appear not to be uniform across the system or what was reported to us was non-specific.

1. The library recognizes multiple audiences and accordingly provides equipment and furniture for their unique needs: Adults, Teens, Children, and People with disabilities.
2. The library provides separate areas for staff workspace(s) and breaks and a private area for breast-feeding staff

We rated the Library “no” on this specification because the details of the Strategic Plan goals have yet to be established and therefore the alignment process has yet to take place:

3. The library provides space that aligns with library’s mission and goals. Examples of these spaces are: story time space, study areas, study rooms, quiet space, public meeting space, programming areas with enough space to access and utilize materials, public computing areas, seating areas.

## **Gap 4: Facility Assessment and Planning**

The District does not meet specifications at the essential level in the Assessment/Planning sub-category. However, our rating credits the Board’s formal commissioning of a capital improvement planning project.

### **Recommended Actions**

#### **Near-Term 1: Capital Improvement Project**

The Board should review and, if necessary, revise the charge to the capital improvement committee, to include assessing the facilities by the OLA Standards at the essential, enhanced and exceptional levels.

#### **Far-Term 1: Facilities Assessment and Master Plan**

The Board should prepare to commission a facilities assessment and master plan. The Board will soon have ownership of the facilities that are now 10-14 years old. It is important that the Board be prepared to factor facility maintenance, expansion, renovation, and development into its financial plans.

### **Best Practices Tools**

These resources should be useful to the Board in framing the scope of the facilities assessment and master plan and in considering and structuring a process.

This links to the pdf file of the Multnomah County Library request for proposal (RFP), entitled “Library Facilities Capital Planning Services”, and dated February 5, 2016. This is a best-

practices, scalable template for framing and scoping such a project.

<https://multco.us/file/48601/download>

The following is a link to the Multnomah County Library's facilities planning process. It takes one to the website where one can have input to the planning process through online surveys and in a series of meetings that will be held in early 2017.

<https://multcolib.org/planning/process>

A best-practices example of a finished product is the Pierce County (WA) 2030 Facilities Master Plan. Pierce County (near Tacoma) is a library district with 18 locations and a population of 571,000. It is a "best practices" library district.

<http://www.piercecountylibrary.org/files/library/fmp-summary-report.pdf>

Additional facilities master plan models:

Flathead County Public Library in Montana, seems to have a lot of similarities, such as population, branches) to Jackson County. <http://imagineiflibraries.com/wp-content/uploads/2014/07/Facilities-Master-Plan-7-2-14.pdf>

Ramsey County NC Facilities Master Plan, 2008-2018, has many appealing features. It also illustrates the rapidity of change in various ways. For example, it includes a section on "Library Roles in the 21<sup>st</sup> Century". An important concept to keep in mind is that though current for its time span, those roles are already changing along with the social and technological needs of communities. [http://rethinkinglibraries.org/images/rcl\\_mp\\_6\\_18\\_08.pdf](http://rethinkinglibraries.org/images/rcl_mp_6_18_08.pdf)

## **IN CONCLUSION**

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The Library has faced enormous threats to its existence over the last decade. It is a colossal credit to the people of the County and to the advocates of the Library that the District exists. Not only does it exist, it has a permanent and dedicated funding source, thanks to the voters of the County. It has an elected, dedicated Board, whose members are knowledgeable and deeply committed to serving the community through a Library that is relevant and responsive.

The Library is a viable public library system serving the third largest public library jurisdiction by population in Oregon. Its Board, its staff, and its Friends, Foundation, volunteers, and other advocates are committed to making it the best it can be for all of the people of the County. However, the Library is far from meeting OLA essential Standards.

There are challenges ahead. The District is having to catch up. In one sense, the Board has a fixer-upper with “bones are good.” It is a credit to the Board to be taking stock so that it can plan thoughtfully and strategically for the District’s future. It is certainly a beginning, but there is more work ahead, and this report is a guide for the Board and Library Management. As a result, the leadership of the Library will be better able to set specific goals and performance measures for its Strategic Plan, for the Board and its committees, for the new Library Director, and for other positions the Board may authorize.

We have recommended that the Board orient and organize itself to pursue two parallel paths for library development: a path for the near term and another for the far term. The goal of the near term path would be to work with LS&S to implement those aspects of the Strategic Plan the Board decides should be implemented and to increase the Library’s adherence to OLA standards. The goal of the far term path would be for the Board to develop its plan for operating the Library in the future.

In pursuing these dual paths, staffing is not the only issue but it is the critical issue; not just the number of staff or compensation, but the staffing model and structure, the strategy for staffing the Library, the underlying philosophy. This is critically important because the future of the Library in the community is at stake. These two plans could and should lead smoothly from one to the other. Ideally, LS&S will work collaboratively with the Board toward a strong Library system, based on a clear organizational philosophy and model that is sustainable.

## **ASSOCIATE CONSULTANTS**

### **Deborah Gitlitz**

With 20 years' experience as a bilingual youth librarian in multicultural, economically diverse communities, Deborah is an exemplary and respected practitioner and consultant. Her strengths are in conceptualizing and researching projects, establishing outcomes, and synthesizing information. She has exceptional writing skills and the ability to be clear and persuasive. She is outstanding in youth services, family outreach programs, community networking, story sharing, creative programming, event planning, staff training, and work team leadership. She is bilingual in Spanish reading, writing, and conversational proficiency. She facilitates focus groups, conducts interviews, and develops surveys in Spanish and English.

### **Suzanne Harold**

Suzanne Harold (SMH Consulting, Astoria, OR) is an independent consultant, specializing in youth services. Before moving to the Oregon Coast, she worked for ten years as a librarian with Multnomah County Library (Portland, OR), where she coordinated the country's second largest summer reading program and oversaw the library's adult literacy and citizenship programs. As a consultant, she focuses on serving underserved youth in rural Oregon through coordinated summer reading programs and outreach, strategic planning, and early and school-age literacy, particularly for children with dyslexia.

### **Lucien Kress**

Lucien is a Technology Consultant for public libraries. His expertise is in technology trends and strategies; technology assessment and planning; requirements, elicitation, and specification; technology procurement processes; public computing and device management; and project planning and management. He conducts technology reviews for public libraries and assists libraries with Edge Technology assessments and planning.

### **Ted Smith**

Ted is the Director of the Newport, OR Public Library, and former Interim City Manager for Newport. He is a seasoned public library manager with exceptional ability in working with the community to build a connection with the library. He is a consummate fund-raiser and partner-maker with the community. Ted is active in OLA and is on the OLA Standards Committee of the Oregon Library Association. He was the 2015 Oregon Librarian of the Year.

## END-NOTES

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<sup>i</sup> In FY 2015-16, the District paid LS&S \$5,561,937.12<sup>i</sup> of the District's \$7,375,143 unrestricted operating budget:

Paid to LSSI on contract	\$4,775,001.04
Paid for materials to LSSI	\$ 784,814.76
Paid to LSSI- handling charges	\$2,121.32
Total	\$5,561,937.12

LS&S reported to have spent \$3,668,921 of its receipts from the District for Jackson County Library operational personnel and library materials (see 2016 Oregon Public Library Statistical Report 4.1 – 4.9). This is 65.96 % of the amount paid to LS&S by the District. It is presumed that the balance of \$1,893,016.12, 34.04% of the paid amount, is LS&S costs and profits.

In FY 2014-15, what was actually paid to LSSI is not known because payments to LSSI were made by Jackson County in contracts and other payments. Vicki Robinson went through County records and accounted for, as best she could, the County's payments to LSSI:

Paid to LSSI on contract	\$4,483,709.48
Paid for materials to LSSI	\$739,615.92
Paid to LSSI- handling charges	\$35,205.12
Total	\$5,258,530.52

LSSI reported expending \$3,780,375 of its receipts from the County for Jackson County Library operational personnel and materials (see 2015 Oregon Public Library Statistical Report, 4.1-4.9). This is 71.9% of the amount paid to LSSI. It is presumed that the balance of \$1,478,155.52 or 28.1% of the paid amount was LSSI cost and profit.

Which of these costs are direct or include administrative, overhead, or other indirect costs is unknown. When asked in writing, Dana Braccia of LS&S responded that "some of the lines do reflect [indirect, administrative, overhead]".

<sup>ii</sup> Here are two examples that RMA came across in the course of this study. These are examples of management gaps that occur because management of the Library is bifurcated. Responsibility and accountability is blurred and things fall through the cracks.

- 
1. The process for submitting reports to the State Library has resulted in inaccurate reporting. As previously noted, I examined the 2014-2015 and 2015-2016 Oregon Public Library Statistical Reports. The data therein is the basis of comparison with the comparator libraries. The revenue and expenditure reported, which is crucial to establishing the per capita revenue and expenditure comparisons, was vastly different from what I found on the District's 2016-17 budget document (this shows prior years 2014-15 and 2015-16). I found discrepancies in both fiscal years.

The State deadline for report submission is October 1 for the previous fiscal year, July – June. From June 30 to October 1 is the window for reconciling revenues and expenses. This is also the window for completing the financial audit. Having the audited figures would ensure that the district's actual revenues and expenditures are accurately reported to the State Library. The report should be reviewed by the District Board for accuracy and final approval before submission to the State Library.

2. It is not transparent for the District to verify the accuracy of data entered into the State Library report by LS&S on the District's behalf. This is particularly concerning when it comes to the expenditures reported by LS&S. The District cannot know for certain if the amounts reported to the State Library on behalf of the District in these categories are accurate: salaries and wages, employee benefits, books and other print materials, periodicals and other serial subscriptions, electronic materials, and other materials.

<sup>iii</sup> The following was provided in a communiqué from Dana Braccia concerning maintenance of the database of card holders and its currency.

*"Here is info on record maintenance schedule:*

*In regards to Polaris data - Jackson County Library upholds a high standard in keeping the database up-to-date with respect to bibliographic, authority, item and patron records. Library guidelines, processes and procedures were established long ago to govern the system-wide management of data. The following information speaks directly to deletion of records within the Polaris database and has been in standard practice throughout the contract:*

- *Bibliographic records without item holdings are deleted from the database every 60 days.*
- *Authority records with unlinked headings are reviewed and deleted from the database every 60 days.*
- *Item records with a circulation status of Withdrawn are deleted from the database every 60 days.*

- 
- *Item records with a circulation status of Lost transition to Withdrawn at 2 years of age.*
  - *Item records with a circulation status of Missing transition to Withdrawn at 1 year of age.*
  - *Patron records that are expired or inactive without items or fees connected to the accounts are purged every 3 years as mandated by the State Library. The last patron purge was done May 2014.*
  - *In summary Jackson County Library System consistently upholds a high standard of data management.”*

<sup>iv</sup> Deliverables in the job announcement for Library Marketing Coordinator

**Main Deliverables:**

- Responsible for all marketing and public communications
- Leverage social media to drive the library's mission and vision
- Manage and coordinate all marketing, advertising and promotional staff and activities
- Analyze customer research and current market conditions
- Develop and implement marketing plans for the public library in support of the strategic plan
- Manage the productivity of the marketing plans and projects
- Monitor, review and report on all marketing activity and results
- Deliver marketing activity within agreed budget