



August 27, 2009

Agenda Item 5.0: Internal Assessment Report

TO: Sacramento Public Library Authority Board Members

FROM: Rivkah K. Sass, Library Director

RE: Internal Assessment Update

Introductory Note

An assessment of the personnel, fiscal, operational and organizational stabilization needs of the Sacramento Public Library Authority was presented to the Authority Board at its meeting of January 22, 2009. At that time, the Board approved proceeding with more than 300 recommended actions items contained in the assessment and requested that monthly status reports be provided to indicate the progress of meeting the objectives. At this time, staff has completed 80% of the items contained in the assessment report. This is the sixth monthly progress report that presents those items considered to be of a more routine nature and can be accepted in a single motion. Assessment items that were more substantive in nature are included in separate reports of this same Board agenda.

RECOMMENDATION: Accept this report that provides information on assessment tasks that were due to be completed by July 31, 2009, except for those included elsewhere on the agenda.

- 1. Pursue funding options to add Automated Material Handling System (AMHS) and Radio Frequency Identification (RFID) in all new library branches (Ross, Tucker – July 2009). Recommendation 210**

Completed Tasks: The implementation of Radio Frequency Identification (RFID) technology in all new branches has begun. On December 6, 2008, the new Elk Grove Library became the first RFID-enabled branch of the Sacramento Public Library. The new Valley Hi - North Laguna Library (opening August 29, 2009), the North Natomas Library, and the Robbie Waters Pocket-Greenhaven Library are all scheduled to open with RFID technology in place. Library staff has begun the discussions for funding the Automated Materials Handling System (AMHS) in all new capital projects. The City of Elk Grove will consider funding an AMHS system this fall using carry over capital project funding from the Elk Grove Library capital project. Staff continues discussion with the City of Sacramento administrators exploring options for funding these systems in the new Valley Hi – North Laguna Library, the North Natomas Library, and the Robbie Waters Pocket-Greenhaven Library. The new facilities have all been designed and are being constructed to accommodate the addition of the AMHS when funding is identified.



August 27, 2009

Sacramento Public Library Authority

Agenda Item 5.0: Internal Assessment Report

Next Steps: Staff will continue discussion with the City of Sacramento to explore options for AMHS funding for the three new city library branches.

2. Create a financial plan that provides long range projections to the Authority Board (Teichert, Johnson - July 2009). Recommendation 60

Completed Tasks: Staff has developed the structure for a financial plan, which projects revenues and expenses over a seven year period. This includes setting up a comprehensive spreadsheet that provides for modeling various assumptions in revenue and expense growth and trends. The model includes the most recent year of actual revenues and expenses (FY 2008/09), the current budgeted year (FY 2009/10) and five projected years. Staff will be documenting the assumptions that will drive the completed long range financial plan and present the plan to the Budget/Audit Committee of the Board in October and the Library Board in November/December 2009.

Next Steps: Staff will Document the assumptions driving the direction of revenues and expenditures, and prepare the financial plan for review by September 30, 2009. Staff will present the draft plan to the Audit/Budget Committee of the Board in October 2009, and present the complete long range financial plan to the Library Board in November/December 2009.

3. Evaluate the feasibility of eliminating paper mailers for holds and overdue notices (Calderon, Freeman - July 2009). Recommendation 144

Completed Tasks: During the 2009-2010 fiscal year, approximately 1,385,000 library users were notified when requested materials are ready for pickup at their preferred locations or when borrowed materials are past due. 64% of the customers prefer to be notified electronically, while 29% choose to be notified by phone. The remaining 7% continue receiving paper mailers.

Since FY 2004-05, electronic customer notifications via email increased from 32.9% of the total in FY 2004-05 to 64% of the total in FY 2008-09. Over the same five year period, paper notices have decreased from 11% to 7% of the total. Each year, the Library spends over \$58,000 on paper supplies and stamps plus labor costs.

Next Steps: Based on the data presented above, staff will make the recommendation to eliminate paper mailers for holds and overdue notices, and to transition customers to electronic notifications through a strong publicity campaign by the Communications departments and public service staff.



- 4. Perform electrical and data evaluation for all branches for potential installation of stack-end public catalogs to facilitate implementation of Model for Service (Calderon, Tucker - July 2009). Recommendation 182**

Completed Tasks: Currently, there are ten branch libraries where computers were relocated to the end-of-stacks. An assessment conducted in July 2009 identified fifteen branch locations that could accommodate relocation of computers at various end-of-stack locations at a cost of approximately \$1,500 per unit. Staff will present these findings to public service managers, and a proposal will be prepared and presented for budget considerations.

- 5. Purchase and Install software that bridges the Millennium System materials purchasing to the Eden Accounts Payable System (Johnson, Rokke, Calderon - Jul 2009). Recommendation 71**

Completed Tasks: In June the Library purchased a Millennium add-on package that bridges Millennium System materials purchasing to Eden Accounts Payable. As a subledger to the Eden Financial system, Millennium holds important financial data associated with the purchase and payment of the Library's books and materials. The software bridge will allow Finance staff to pull detailed payment information and associated cost allocations from Millennium in a format acceptable for direct import into the Eden System. This is an exciting prospect for both the Finance and Collection Management departments as we recognize time savings associated with the reconciliation and allocation of books and materials and as we look forward to providing managers with the most accurate cost accounting of books and materials to date.

Next Steps: Finance staff will work with Collection Management to insure that cost funds within Millennium are updated and appropriate matched to current Eden cost centers. Staff will also conduct system testing, document the new processes, train staff, and complete implementation of the bridge by January 2010.

- 6. Develop a financial document retention methodology for the Authority that allows for appropriate control of documents in accounting to ensure their availability for review and audit (ML6; Boerman - July 2009). Recommendation 45**

Completed Tasks: The Finance Department has defined a methodology for indentifying, categorizing and scheduling various accounting records for retention and disposal. Initially this project will include only accounting documents but can be expanded to accommodate records from all



August 27, 2009

Sacramento Public Library Authority

Agenda Item 5.0: Internal Assessment Report

departments of the Library. Records archived within the Library will be clearly labeled with disposal dates.

The record retention schedule will be defined by the following categories:

- Record Schedule ID
- Retention Group (department location)
- Record Location (record location within the department)
- Record Description
- Retention Timing
- Method of Disposition (toss, shred, destroy)

Next Steps: Finance staff will write record retention policy with guidelines, determine the Retention Group ID for the Finance Department, develop record retention schedule for accounting records, and assign staff to oversee the retention schedule.

7. Review and update the Circulation policies and procedures by: Developing circulation service desk manuals for staff to ensure consistent service provision throughout the system (Circulation Supervisors – July 2009). Recommendation 262c

Completed Tasks: Staff reviewed and updated the circulation policies and procedures. The manual is available to all staff on the intranet at any time to ensure consistent service provision. A plan is in place to update and make changes to the manual to ensure currency, and staff will be assigned to review the entire manual annually.

8. Develop a comprehensive review of the Collection Management department in order to improve productivity and efficiency by: Contracting with a vendor to provide opening day collections for new branch libraries (Rokke, Dentan, Freeman - July 2009). Recommendation 271b

Completed Tasks: The initial delivery of 21,500 items for Valley Hi-North Laguna was received July 21, 2009, and another 6,000 items will be delivered August 18, 2009. Staff will use the remainder of the opening day budget for titles published between August and October to supplement the branch's regular materials budget. An RFP was issued and a recommendation was approved by Authority at its May 28 meeting to select vendors for the North Natomas and Robbie Waters-Pocket Greenhaven library collections. Pending confirmation of reimbursement by the Sacramento City Council, the Library is prepared to contract with Baker & Taylor to provide print the collection and Midwest Tapes to supply the media collection for both libraries.



Next Steps: Staff will complete the Valley Hi-North Laguna collection project, develop the collection for the North Natomas Library with vendors and branch staff and profile the Pocket-Greenhaven area to gather data about the community so that the vendor can start collection development.

- 9. Implement an automated methodology to reduce the cataloger's labor intensive work that includes checking every record to ensure that author/subject information is consistent in the catalog (Rokke, Newton - July 2009). Recommendation 273**

Completed Tasks: The company Marcive was contracted to perform an authority control and catalog records quality control project over the entire Library catalog. Project profiling started in March and the project was completed in early July. In late July, the Library began the process of electronic monthly submission of all new records created. A single monthly process now takes the place of catalogers checking every record. Staff will review the costs and benefits of automated authorities for the FY 20010-11 to determine whether to renew the monthly update.

- 10. Work with the Information Technology Department to provide the following human resources information on the intranet:**
- **Human Resource policies and procedures;**
 - **Salary schedules;**
 - **Job openings;**
 - **Benefit information;**
 - **Human resource forms;**
 - **Training opportunities;**
 - **New Employee Handbook (Bagdassari, Calderon, Shaffer, HR team - July 2009). Recommendation 99**

Completed Tasks: The Human Resources Department has utilized the library's intranet site, SPL@, to post all current HR information on the HR homepage including all Board approved policies.

Next Steps: The Human Resources department is in the first stage of planning an Employee Handbook based on the MOUs and policies/procedures manual. Human Resources staff will continue to update information as it changes and/or becomes available for posting.

- 11. Complete an employee records audit and revise the current filing system (Trejo, HR Team - July 2009). Recommendation 100**

Completed Tasks: Staff first audited and revised the employee files in September of 2008, and continual audits for accuracy and consistency are done as employee files are updated. A full audit will be done once a year, and another audit is scheduled to be completed by September 30, 2009.



- 12. Audit and update employee information in Eden system, including but not limited to hire dates, seniority dates, anniversary dates, etc. (Bagdassari, HR Team - July 2009). Recommendation 101**

Completed Tasks: Human Resources staff has created a number of Crystal Reports to identify and extract Eden information that is inconsistent. Based on these reports, the electronic records are corrected to ensure data accuracy. The Crystal reports will be run on a regular basis in order to monitor Eden data and rectify inconsistencies.

- 13. Add a new code to Hour Types in Eden to be able to monitor sick time used in order to better track SDI integration with PTO hours. (Bagdassari, Viviano, Finance - July 2009). Recommendation 102**

Completed Tasks: Human Resources staff members have demonstrated that new hour type codes are easily created in Eden, and will not cause database irregularities. The department managers have met, discussed and agreed that these codes are necessary for accurate recordkeeping. Human Resources and Finance will implement the first of these hour codes by the end of August 2009.

- 14. Strengthen and maintain positive community relationships by: Participating in the California State Library's initiative, "Get Involved: Powered By Your Library," designed to attract Baby Boomers to volunteering in library service (Biddle, Hernandez – Jun 2009). Recommendation 299d**

Completed Tasks: Beginning in August of 2008, Central's volunteer program was revamped with a new vision to build and strengthen positive community relationships while fulfilling SPL's Mission Statement Goal to maximize public and private financial resources and support for the Library. The State Library's program, "Get Involved...", designed to attract Baby Boomers, ultimately became a competitive initiative; SPL was not one of the libraries selected in the initial round of participants who received training and set-up. However, on behalf of all California libraries, the State Library purchased access to volunteermatch.org, which provides a platform for libraries to advertise various volunteer opportunities.

Under the leadership of Central's Volunteer Coordinator, Lynnette Hernández, the Central Library developed job descriptions and postings for Central's volunteer opportunities on volunteermatch.org. Currently Central has five volunteer positions posted. Lynnette has proactively shared her expertise of the site with all branch supervisors, to enable each branch to develop and post volunteer opportunities on this far-reaching web site. Central Library has 33 active volunteers, who logged in 1,814 hours of



August 27, 2009

Sacramento Public Library Authority

Agenda Item 5.0: Internal Assessment Report

service between January and July 2009. Under Lynnette's coordination, our volunteer program has grown and been highly successful.

Next Steps: Staff will target state workers to volunteer at Central Library for the September 11 National Day of Service, apply for participation in the "Get Involved" program next year if offered again by the State Library, and continue to develop sustainable volunteer opportunities for all age groups at the Central Library.

15. Update Central Library's assistive technology features to ensure access to library resources by customers that are visually or hearing challenged (Biddle, Higginson – Jun 2009). Recommendation 301

Completed Tasks: In July, Central and Information Technology staff met with Rigel Technology, a Sacramento-based company that provides assistive technology evaluations. Staff also consulted with members of the community who rely upon the library's resources, to determine their needs and preferences. Based on this information, the following prioritized list of equipment has been recommended:

- A 20" closed circuit television designed for the low vision user
- A reading machine/scanner – an electronic device that scans a printed page and, through an internal synthesized voice, reads the printed material aloud
- System Access – freeware that enables audio access to the Internet, Microsoft Office products, etc.
- Voice recognition software, which uses voice commands in place of a mouse and keyboard to enter data into a computer or to navigate a website

Next Steps: Central staff will consult with the County of Sacramento, the Sacramento Disabilities Advisory Commission and Society for the Blind for additional recommendations by September 30, 2009. The Central Library Manager will identify funding sources and develop a phased procurement plan. The CCTV is the highest priority and will be purchased in 2009.

16. Explore the possibility of offering a Spanish language story-time for preschoolers in the Delta branches (Dentan, Brown, Beaver - July 2009). Recommendation 260

Completed Tasks: Sally Sweeny (Branch Supervisor) is currently presenting bilingual story time at the Courtland Library, and Julieta Carrillo (Library Associate at Franklin) has been trained in performing Spanish Language story times.



August 27, 2009

Sacramento Public Library Authority

Agenda Item 5.0: Internal Assessment Report

Next Steps: Julieta will create a six week Spanish language story time series to be simultaneously implemented at a minimum of two Delta locations before December 31, 2009. If successful, staff will continue and expand Spanish language story times in 2010.

17. Explore staffing options for day custodial coverage in branches. Current services are pre-opening only, providing no service during open hours (Nash, Tucker - July 2009). Recommendation 165

Completed Tasks: The branch custodial staff schedules have been changed from 3am – 11:30am to 6am – 2:30pm. This change has improved the safety and wellness of the Library custodial staff and has given the branch libraries access to a custodian during the first few open hours of each day. Cleaning activities have been modified to reduce the disruption of operations after opening. For example, carpets are cleaned with a cordless sweeper instead of vacuuming one or two days each week. The start time is rotated among branches to ensure that thorough vacuuming occurs at least on the other two or three days per week.

Next Steps: Staff will continue to seek feedback on the schedule from branch staff and Branch Services Managers. To date the feedback has been overwhelmingly positive. Staff will also post all custodial work schedules on SPL@ and encourage staff to stay informed on their branch's schedule.

18. Work with Sacramento City staff to replace the trash enclosure at South Natomas that was removed by the city to allow for the installation of the rose garden (Tucker, Wallace - July 2009). Recommendation 167

Completed Tasks: The original trash enclosure at North Natomas was removed when the rose garden was installed about three years ago. There was no plan to replace it, so Library cleaning staff take trash and recyclables across the property to the bins at the Community Center. Library Facilities staff met with City staff to explore the costs and potential locations for a replacement enclosure, and the cost estimate of \$46,984 was deemed to be prohibitive. Staff will continue to seek options for replacement of the enclosure to increase staff safety and efficiency.

19. Restructure supervision on Central Library's custodial staff (Nash, Tucker - July 2009). Recommendation 169

Completed Tasks: The custodial staff at the Central Library were put under the supervision of the Custodial and Logistics Supervisor as part of the Facilities reorganization implemented in May 2009. The Custodial Field Supervisor assists and collaborates to ensure consistent custodial services among the branches and Central. Staff will continue to monitor the training



August 27, 2009

Sacramento Public Library Authority

Agenda Item 5.0: Internal Assessment Report

and supervision of custodians at Central to ensure consistent cleaning methods and materials among all Library locations.

20. Consider the addition of a second maintenance truck that is equipped with tools, ladder rack and equipment for field maintenance service (Wallace, Tucker - July 2009). Recommendation 171

Completed Tasks: The Library already operates a maintenance pickup truck but it is not equipped with the necessary features for the 2nd Building Maintenance Worker currently being recruited. Competitive bids are being sought for a ladder rack and lockable tools boxes to make the vehicle fully equipped when the position is filled.

Next Steps: Staff will finalize competitive bids, order the needed truck features, and supply an inventory of Library tools for the vehicle.

21. Establish a deferred maintenance list of projects that need to be completed but for which funding has not yet been identified (Tucker, Wallace, Baer - July 2009). Recommendation 173

Completed Tasks: The Joint Powers Agreement for the Library calls for daily maintenance of all Library Facilities by Library staff. This is generally agreed to include lamp replacement, minor plumbing and electrical repairs, small painting projects, lock and door hardware maintenance, minor flooring and walkway repairs and other safety repairs. A deferred maintenance list for these types of repairs is not necessary because they are almost all completed within 60 days. The project requests, however, go into a long term queue within the Service Request Form (SuRF). That list, after approval by Branch Services Managers, forms the basis of a deferred maintenance or deferred project list, waiting for budget funding. Staff will continue to monitor the SuRF project requests for available funding and priority implementation.

22. Finalize interim appointments and fill open positions in Facilities (PA 4-1; Tucker - July 2009). Recommendation 176

Completed Tasks: Three positions have been filled: Safety Coordinator, Special Projects Coordinator and Custodial and Logistics Supervisor. The Facilities Services Supervisor is currently being recruited, as is the Building Maintenance Worker. The Security Supervisor (currently Interim) will be recruited in the near future.



- 23. Review possible projects that would enhance the value and use of the Galleria meeting spaces and determine the cost benefit. Install built-in LCD projectors in Galleria and East and West meeting rooms to allow more efficient room set-ups and better presentation quality (Bennett, Tucker - July 2009). Recommendation 185a**

Completed Tasks: Staff has installed new sound systems in the Galleria and East/West meeting rooms, providing much improved sound quality for events in those spaces. A wide format projection screen is on order for the Galleria that will provide a substantially larger viewing area for video presentations in that space. New portable LCD projectors are in use where needed in lieu of built-in projectors, to provide more flexibility for room set-up configurations. Staff will continue to seek input from meeting space customers on their needs and wishes for expanded audio-visual features in the Galleria complex.

- 24. Review possible projects that would enhance the value and use of the Galleria meeting spaces and determine the cost benefit. Explore the addition of digital event signs at meeting rooms to announce events (Tucker, Bennett - July 2009). Recommendation 185c**

Completed Tasks: Staff has developed cost estimates for digital event signs both inside and outside the Galleria, and the high costs have been found to be prohibitive at this time. Staff will continue to monitor the event equipment market for new and less expensive digital signage options.

- 25. Study the feasibility and desirability of discontinuing the use the Galleria entrance as a daily entrance for the Central Library (PA 4-3; Tucker, Biddle, Bennett - July 2009). Recommendation 188**

Completed Tasks: The Library/Galleria team has met and discussed this issue several times. Further discussion and movement toward a conclusion will be deferred until after the arrival of the new Director because of the wide impact this decision will have on the daily operation of both the Main Library and the Galleria. A meeting with the new Director is scheduled for August 31 to further discuss this issue.

- 26. Improve key control for all Library access doors: Establish a complete key sign-in/sign-out procedure for all employees. Require sign in and out at new hire and transfers (Tucker, Foley, Dahlberg - July 2009). Recommendation 196a**



Completed Tasks: Staff has circulated a simple key sign-out draft for discussion that will state the responsibilities of the key holder and specifically prohibit the misuse or loaning of any Library key.

Next Steps: Staff will obtain final agreement among BRS staff on the key agreement language, and complete branch staff key distribution lists for each location.

27. Establish a uniform process of delivery making the delivery process of every Library branch uniform. Eliminate unique preference lists. (Tucker, Nash - July 2009). Recommendation 212

Completed Tasks: Daily deliveries of book bins at branch locations had evolved into a wide range of delivery preferences that hindered the efficiency of logistics staff, which had to remember a large number of location idiosyncrasies. To address this, staff has developed uniform delivery processes to ensure that the same systems were in place at all branch locations. Staff will continue to monitor delivery processes to ensure the best possible efficiencies and safety procedures.

28. Evaluate the financial feasibility of maintaining a small inventory of event furniture at Central and at some branches to reduce the number of delivery runs and to improve event planning (Tucker, Nash - July 2009). Recommendation 214

Completed Tasks: Special events held at branch libraries often require a large assortment of portable tables and stackable chairs for the event. In order to meet this need, tables and chairs need to be gathered from multiple branches, delivered to the special event, and then returned to the original branch. An inventory of this portable furniture at the Central Library would save significant amounts of staff time and miles driven to deliver and return this furniture.

Next Steps: Staff will gather item costs and optimal inventory levels to keep at Central. Staff will also seek funding in future budget cycles to establish this inventory.

29. Replace the carpet at Belle Cooleedge, rework the front entry area, reference and circulation desk areas (Tucker, Ross, Teichert - July 2009). Recommendation 225

Completed Tasks: Late this fall the Belle Cooleedge Library will be refurbished. Rainforth Grau Architects are collaborating with staff and Friends representatives on the transformation of the interior space of the library. Plans include replacing the carpet; reconfiguration to the one service desk model; creating a central market place to house new books,



August 27, 2009

Sacramento Public Library Authority

Agenda Item 5.0: Internal Assessment Report

media, and world languages; a colorful and exciting makeover for the Kids' Place, and expanding the Teens@ space.

Next Steps: Staff will refine design, create a work plan and project schedule to accomplish refurbishment by January 2010.

30. Advertise bidding opportunities on the Library's website (Tucker, Miranda, Shaffer - July 2009). Recommendation 228

Completed Tasks: The Library's new website includes pages set aside to advertise bidding or proposal opportunities for vendors and contractors. The site is not widely known and it is not yet clear how many potential vendors are checking it for competitive bids. The City of Sacramento website remains the most productive location for advertising bids. Staff will seek more prominent locations on the new Library site for these bidding opportunities to increase exposure and improve competition.