



May 28, 2009

Agenda Item 4.1: Internal Assessment Progress

TO: Sacramento Public Library Authority Board Members

FROM: Phil Batchelor, Interim 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. This is the fourth 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 considered by the Authority Board during their May 28th board meeting.

- 1. Analyze the impacts of weeding and discarded materials in the delivery system and the distribution of these materials through the Friends Group (Landers, Tucker, Nash, Murphy – April 2009). Recommendation 267**

Work with the Friends to establish a plan for handling the materials that go to them in a timely manner (Landers, Tucker, Nash, Murphy – April 2009). Recommendation 268

Completed Tasks: Staff met with the president of the Friends to discuss issues regarding weeded and donated materials that are delivered to the Book Den and Warehouse. A schedule was designed and implemented for Library staff to deliver materials to the warehouse. Additionally, the Friends cleared adequate space in the warehouse to accommodate the delivery of materials, regardless of book sales and related events. The schedule and procedure will be reviewed in October 2009.

- 2. Create a standard recognition process to acknowledge support received from the Library Foundation and Friends Groups (Landers, Butcher, Shaffer – April 2009). Recommendation 269**

Completed Tasks: Staff of the Foundation, Marketing team and Library has had preliminary discussion of the item and the need for consistent and clearly defined guidelines as to how gifts and donations are recognized and



highlighted. The Marketing Staff is in process of an internal review and will be making recommendations on operations and activities. Included as part of the review and proposals, will be the development of Marketing Guidelines, which will ensure a consistent manner for the recognition of donations and gifts, identification of the communication vehicles for recognition so that the donors, partners/support groups and Library staff will know what to expect. Staff from the Marketing department, the Deputy Director for Public Services and the Executive Director of the Foundation will develop these guidelines by June 30, 2009.

3. Restructure TELIS (Telephone Information Service and Circulation Help Line) to better serve patrons in a timely manner with the appropriate level of staff by: developing and providing training for the paraprofessional staff in TELIS (Biddle, Higgerson, Owens, Weekley – April 2009). Recommendation 297b

Completed Tasks: A small Central staff group met in February to discuss ideas for training; Ann Owens and Geoff Rohde proceeded to develop a curriculum and Ann developed a PowerPoint presentation as an introductory overview. Over the past two months the training has progressed and has been tailored to best meet the needs of the paraprofessional staff and to provide them with full support as they assume new responsibilities and an enhanced role in customer service. The training schedule is as follows:

- March 4 One hour PowerPoint training/overview of TELIS provided to all full-time LSAs (Owens)
- March 5-31 Two hours of one-on-one training on the TELIS lines for all full-time LSAs (Rohde, Owens)
- March 18 Follow-up session with full-time LSAs to answer questions and identify additional training needs (Rohde).
- April 15 Two sessions provided at Circulation staff meetings to answer questions, identify need for follow-up training, and to provide a review of information sources (Rohde)
- Mar 5-Apr 30 Self-paced review of "TELIS Tip Sheet" online and review of information resources available
- Apr 16-30 Two additional hours of one-on-one training on the TELIS lines for all full-time staff (for a total of four hours on one-on-one); two hours of one-on-one training for all part-time LSAs.

Next Steps: Staff will identify and outline technological changes and news messaging in preparation for adding LSA staff to the TELIS lines in May 2009. Any additional training needs for the staff will be identified and completed in early May.



4. **Develop a comprehensive review of the Collection Management department in order to improve productivity and efficiency by: Increasing the number of vendors with whom the Library places orders and receives bibliographic and order records electronically, thus decreasing the number of hand-entered orders each month by at least 25% (Rokke, Selectors, Nelson, Noblet – April 2009). Recommendation 271f**

Completed Tasks: The item listed above is part of a larger comprehensive study and reconfiguration of the Collection Management Department that will be reported in more detail in July 2009.

5. **Develop a comprehensive review of the Collection Management department in order to improve productivity and efficiency by: Exploring the feasibility of electronic invoicing with large vendors to reduce the labor intensive practice of keying invoices (Rokke, Noblet, CMS staff, Nelson – April 2009). Recommendation 271g**

Completed Tasks: In exploring the electronic invoicing process, particularly the benefits in time saving, the Collection Management department determined to move ahead with this change. This will significantly increase the speed of the receiving process since receivers will proof downloaded invoices instead of keying them individually. The first vendor trial did not work because the system the Library uses for electronic communication between vendors and acquisitions is an older version that does not include electronic invoicing. Adding this capability requires an upgrade; funds have been identified and a purchase order will be issued for this upgrade. Electronic invoicing will be implemented by the first quarter of FY 2009-10.

6. **Improve access to library materials through a project plan to weed, evaluate, and enhance targeted areas/subjects of the collection (Rokke, Public Services Staff – April 2009). Recommendation 272**

Completed Tasks: Branch staff are following a two year schedule to evaluate and weed the entire Library collection by June 2010. As of April 2009, the majority of adult non-fiction and children's non-fiction material has been weeded. Branch staff continue to put forward titles and subjects for replacement based on the evaluated areas. The system-wide evaluation and weeding of the collection will continue on the two year schedule.

A turnover report was created in April 2009 to compare the usage of library materials from April 1 2008 – March 31 2009 with the usage of the previous year. Turnover is a reflection of how many times an average item is checked out in a year; higher turnover indicates a stronger, well-used library collection. Although not all of the non-fiction has yet been evaluated and weeded, turnover for all children's print non-fiction has increased from



1.83 average checkouts per item per year to 2.14. Turnover for all adult print non-fiction has increased from 2.00 checkouts per item per year to 2.35.

7. Work to establish a core reference collection in all library branches that will ensure all locations have the basic tools to provide adequate information services (Rokke, Aguirre – April 2009). Recommendation 276

Completed Tasks: A team of branch and Collection Management staff, aided with input from two staff surveys, have determined the list of Core Reference titles. The list of forty core reference titles required for each branch was presented to staff in April. In May branch staff will have the opportunity to purchase new titles or replace older editions to ensure that the core list is available. Branches will also have the opportunity to add an equal number of optional titles to their reference location depending on local needs. The core list will be reviewed annually and titles will be updated based on feedback and the increasing availability of online resources that provide the same information.

8. Advertise new library service changes after website, new public catalog interface, and Model for Service launches on English and Spanish radio, bus shelters, newspaper and Internet (Shaffer, Mijares, Dentan, Grant, Burns, Azevedo – April 2009). Recommendation 238

Completed Tasks: The item above was reported to the Authority Board at the April 23, 2009 meeting in item 4.6 Library Advertising Campaign. As reported, the Library launched an advertising campaign titled "*Sacramento Public Library: Better Every Day!*" All design, planning and procurement of media was conducted in-house. Elements of the campaign included the following advertising: bus and bus shelter signage, billboards, Internet banner ads, radio (both general market and Hispanic), newspaper inserts and rack cards, direct mail, and banners. All visual elements were similar in design, verbiage, and coloring with slight variations as needed to accommodate the medium used.

9. Amend the contract for fiscal services with the City of Sacramento to provide for investment and treasury services only (Teichert – April 2009). Recommendation 50

Completed Tasks: Staff has worked with the City of Sacramento Treasurer's office to draft a proposed agreement for investment and treasury services. The City Treasurer maintains a standard agreement for providing investment services to partner government agencies. Authority Counsel is



currently reviewing the draft document. The proposed agreement will be finalized and presented to the Authority Board in July 2009.

- 10. Complete the implementation of the new JPA Financial Structure through the implementation of the Board-approved recommendations of the Finance Advisory Committee including: evaluate the \$7 per square foot support amount and adjust based on the Engineering News Record (ENR) Construction Cost Index for FY 2009/10 payments (Teichert, Johnson – April 2009). Recommendation 229e**

Completed Tasks: The Authority Board approved the FAC recommendations to provide funding for capital maintenance and building owner related costs for libraries supported by property tax revenues in the County/Cities fund. This amount is initially calculated at \$7 per square foot, which is adjusted by the annual change in the ENR Construction Cost index each December. Currently two agencies are receiving funds: the City of Elk Grove and the City of Galt. The December 2007 to December 2008 index rose 5.7%, adjusting the per square foot amount to \$7.40. Staff will include a budget amount of \$132,645 in the FY 2009-10 budget to address this contribution commitment, which includes the ENR index adjustment.

- 11. Analyze and determine the most effective solutions to address Other Post-Employment Benefits (OPEB) to achieve Governmental Accounting Standards Board-45 (GASB45) compliance and a long range plan for managing retiree health benefits (Teichert, Bagdassari, Johnson – April 2009). Recommendation 231**

Completed Tasks: Staff presented the Library Authority's actuarial assessment for the long term liability for OPEB benefits for retiree health costs. The actuarial report also established an Annual Required Contribution based on several assumptions. Staff has included the lowest cost ARC in the FY 2009/10 proposed budget. Staff will prepare a presentation to the Board for the August 2009 meeting to review the status of funding the required contributions and options for managing the funds to be set aside in a trust versus internally.

- 12. Train branch supervisors and managers on the budgeting process and how to use financial reports to adhere to established budgets (PA 1-3B; Baer – April 2009). Recommendation 40**

Completed Tasks: Meetings with management and supervisory groups were held throughout February to review instructions on how to access and input proposed budgets in respective unit's budget documents. Written instructions on how to access budget documents and input budget figures and informational detail were made available on the Library's intranet for



May 28, 2009

Sacramento Public Library Authority

Agenda Item 4.1: Internal Assessment Progress

reference, and personal instruction was provided as needed. Management and supervisors successfully completed the 2010 budget cycle. Instruction on reading financial statements was presented to Branch Supervisors in May. Staff emphasized the importance of regular financial monitoring as an internal control tool, a budgeting tool and a planning tool. The instruction included review of budget to actual data against a variance column to compare the percent of actual budget expired against a year to date benchmark.

Examples of notable conditions that could exist and for which staff should be aware of include timing variances, added or abandoned projects, unexpected expenditures, overspending, miscalculation of budgetary needs, and miss-postings. Written instructions containing this information were added to the growing list of financial reference materials on the Library's intranet, which includes instruction for accessing revenue and expenditure reports in the financial system.

Next Steps: The Finance Department will communicate to staff when final monthly reports are available for review and a monitoring tool has been developed to provide regular feedback from managers and supervisors on the financial condition of their respective units. This will allow management to stay up to date on financial conditions and to provide timely response or adjustments when appropriate.

13. Establish a Public Services/IT task force as an element of the governance structure to evaluate and recommend new technologies useful in the delivery of public services and to be used as one of many inputs into the IT Strategic Plan (Calderon, Landers, Freeman, Dentan – April 2009). Recommendation 120b

Completed Tasks: The Public Services/IT task force will explore both current and emerging technologies in non-library environments in order to evaluate their service implications and potential applications at the Library. The charge to the group is to assess the extent to which current library services meet user needs and to make recommendations to the Library's Information Technology Governance team and Administration regarding technologies and technology-based services to be implemented. The Public Services/IT task force is a multifunctional team consisting of personnel from public services and IT personnel with a strong interest and awareness in the use of technology to enhance services. The group's first meeting is scheduled for May 14, 2009.

Next Steps: The next steps for the Public Services/IT task force will include assessing a prioritized list of library services, establishing the process framework, and identifying and prioritizing a list of emerging technologies used in non-library environments.



14. Improve and manage the Information Technology Help Desk proactively by assessing customer expectations through survey and evaluation of performance commitment (PA 3-6; Calderon – April 2009). Recommendation 121f

Completed Tasks: The April 2009 Administrative Services Survey showed the lowest level of agreement is “understand my needs” (49.1%) , and the measure with the highest level of agreement is “responsive to my requests” (89.3%). Staff from the Information Technology Department has made a commitment to build upon strengths and work on weaknesses by developing action plans within the next three months to specifically target and improve upon the results of each category in the survey. These next steps will include working with Human Resources to develop technology core competencies for Library staff, creating a technology user group to participate in the evaluation of existing technology and to make recommendations regarding software upgrades, and scheduling Information Technology personnel to work in public service areas to gain in-depth knowledge in the use of technology by staff and customers.

15. Migrate to the new PC Reservation system and implement effectively (Calderon, Worthy, Carreon – April 2009). Recommendation 128

Completed Tasks: The much anticipated migration to the new PC Reservation system was introduced to the public at Central Library on April 6, 2009. The new system features a more flexible booking system and allows for unlimited sessions. As an added security measure, customers are required to use their barcode and PIN number upon sign-on. Upon installation at each site, branch personnel receive hands-on training and additional technical support is available on-site to ensure a successful transition. The current implementation schedule involves an upgrade at two branches each week. Completion of this project is scheduled for July 7, 2009. The implementation team will collect feedback from staff and customers and make necessary adjustments in a timely manner. The implementation team will also monitor and evaluate future software releases to recommend features that improve functionality and customer service.

16. Develop a plan to raise awareness of the library and provide outreach through utilizing a partnership of library staff, volunteers, Library Friends and other library activists to attend or speak at events or other activities and to act as liaisons within the community (Cantin, Rondeau, Dentan, Freeman – April 2009). Recommendation 293



May 28, 2009

Sacramento Public Library Authority

Agenda Item 4.1: Internal Assessment Progress

Completed Tasks: The Sacramento Public Library provides services that enhance the quality of life for Sacramento citizens. These services are well used, but can be even better used if more of the community is made aware of them (these services include books, children's and adult programs, spaces to study and learn, online homework help, college and job search help, and Adult Literacy Service). Enlisting the help of volunteers, Library Friends and other library activists to be liaisons for the library and utilizing their assistance in distributing informational materials, attending and speaking at events and local activities will extend and improve the library's ability to provide outreach. A plan to utilize library advocates has been developed, and staff has begun meeting with branch personnel to discuss the liaison program. The next steps include meeting with branch supervisors to share planning strategies on developing a library liaison group and training staff to work with liaisons.

17. Develop a Human Resources strategic plan that incorporates the use of the performance measurement process (PA 2-2; Bagdassari, Phipps – April 2009). Recommendation 88

Completed Tasks: Through review of many of the responsibilities that fall under the purview of Human Resources, the department has developed a comprehensive strategy for training at all levels of the organization, employee empowerment and self-service, supervisory skills, culture change, and performance management. The Performance Appraisal and Recognition Committee has developed a timeline for implementation of the performance management software, including comprehensive training of managers, supervisors and front-line staff. Policies and procedures are ready to be presented to the Authority Board for approval. The department will continue to adjust its strategy according to employee needs, which will be assessed on an ongoing basis through feedback from staff.

18. Determine if it is feasible to reduce the Human Resources Department's workload by delegating some functions to employees located in the branches (PA 2-1B; Bagdassari, Management Council – April 2009). Recommendation 90

Completed Tasks: Human Resources staff has created a list of Frequently Asked Questions (FAQs) for staff. The FAQs are posted on the HR intranet page. HR has also created a new "HR Connect" email box where employees can submit questions for response by HR staff. The email is being monitored on a daily basis by the department's administrator and routed to the appropriate individual for response. If responses already reside on the library's intranet a link to the response is provided. Although HR department staff is equipped to address a variety of questions, a primary contacts list has been published for employees who wish to speak to staff directly. With regard to delegation of certain responsibilities, approximately



two years ago HR staff trained branch staff to process new Shelves at the branch rather than in HR. The required forms are online along with "how to" guides. HR staff continues to provide assistance when needed, and will continue to review processes that can be done at the branch or unit level.

- 19. Review the current assignments of labor relations functions in the Human Resources Department to ensure optimum efficiency (PA 2-14; Bagdassari, Phipps – April 2009). Recommendation 91**

Develop regular staff training schedules of all available training being offered to Library employees and post to staff intranet (Bagdassari – April 2009). Recommendation 93d Expand New Supervisory Training Program to all supervisory levels (Bagdassari, Management Council – April 2009). Recommendation 93h

Develop and implement training programs to enhance employee skills, knowledge and abilities to serve the public effectively (Bagdassari, Management – April 2009).

Completed Tasks: The items above were reported to the Authority Board at the April 23, 2009 meeting in items 4.1 Internal Assessment Update and 4.2 Staff Training Initiative. Staff will continue to review the assignment of responsibilities to ensure optimum operational efficiency. Staff will also continue to develop and update a schedule of regular, ongoing training for all staff.

- 20. Develop a Disaster Recovery (Business Continuation) Plan by: testing data backup and restoration systems at an off-site location, presuming a complete loss of the existing server room at Central (Tucker, Calderon – April 2009). Recommendation 5d**

Completed Tasks: A backup tape was requested from the Library's secure off-site storage site, Iron Mountain, on May 7. It was delivered in about an hour, and the selected files were restored in 35 minutes. A full restoration of all files is estimated to take three to five hours, easily meeting our 24 hour target timeline. Staff will continue to perform weekly and monthly full data backups and store not less than seven cycles at the off-site location. Annual testing of the data retrieval and restoration process will also be planned.

- 21. Implement a regular and documented custodial services inspection process to provide regular feedback to staff and to recognize outstanding performance (Wallace, Tucker – April 2009). Recommendation 162**



Completed Tasks: A monthly inspection form has been developed and each custodian receives at least one formal inspection each month. The assigned inspector rotates among all Facilities supervisory staff. Custodians that receive an aggregate score of 80% or higher receive a simple certificate of thanks posted on the Custodial Wall of Fame in the Facilities offices at Central. These certificates are signed by the assigned inspector and the Director of Facilities. Staff will continue to perform monthly inspections, and refine the inspection and recognition process as needed.

22. Implement rental rate increases as described in the 2008 Library Galleria Cost Study (PA 4-2; Tucker, Bennett – April 2009). Recommendation 191

Completed Tasks: Room rental rates for the Galleria complex are generally below the local market rates as demonstrated on the chart below. A phased implementation of rate increases is not recommended at this time because of the poor economic climate. A recommendation for higher room rates and a schedule for implementation will be brought back to the Board as a part of the September Final budget.

Current Galleria Rates	Market Comparison	Proposed Rates
Saturday rate \$1950	Vizcaya \$2400	\$2,000 - \$2,200
Meeting room ½ Day \$300	Hyatt \$500	\$400
Meeting Room all day \$400	Hyatt \$1000	\$600

23. Install new Web interface event software and train Library staff on how to access and utilize this information (Tucker, Bennett – April 2009). Recommendation 194

Completed Tasks: A Web interface has been installed and a pilot version has undergone testing by Library staff since February. The new software provides important information on available rooms and on scheduled events in the Galleria. Staff has reported good results from this new source of information.

Next Steps: Staff will change the look of the web page to more closely align with the Library's new website design. In addition, staff will conduct expanding training and rollout to key staff in June 2009.



24. Merge contract documents into one database (Tucker, Miranda, Puerner – April 2009). Recommendation 216

Completed Tasks: A new unified shared drive for all contract and procurement documents has been established. All existing documents will be moved into this new location, to be administered by the Procurement and Contracts Coordinator. As of early May that process is approximately 50% complete.

Next Steps: The new file structure and database on the shared drive will be completed by May 31, 2009. Staff will maintain the database on a monthly basis, and will add new contracts and procurement documents as they are executed. All original signed copies will be maintained at the Deputy Director, Administrative Services office.

25. Implement a biennial Facility Master Plan review process to gauge the developing community needs for new library facilities and services (Tucker, Ross, Landers – April 2009). Recommendation 223

Completed Tasks: This item was reported to the Authority Board at the April 23, 2009 meeting in 6.2 Facility Master Plan Biennial Update Report. Staff will continue to perform this biennial review in April 2011.

26. Fully implement the new Business Travel Account through American Express and Brooke's Travel for all future Library staff travel expenses (Tucker, Miranda, Puerner – April 2009). Recommendation 227

Completed Tasks: This account is fully functional and has been used to coordinate and expense Library travel costs for the past three months. Staff will continue to audit and refine the Library travel cost expense process through this account. Travel costs are anticipated to be minimal through FY 2009-10.

27. Establish an effective measurement tool to evaluate the success of efforts to build a culture of respect and excellence and to measure the change in staff morale (Batchelor, Landers, Teichert, Shaffer, Calderon, Bagdassari – April 2009). Recommendation 1b

Completed Tasks: In conjunction with training efforts over the past three months, staff has conducted a number of staff surveys that address a variety of issues including morale, respect, and a culture of excellence. The results have been quite favorable. In a staff survey from February 2009, 60.5% of the respondents agreed with the statement that "employee



morale is currently improving." In addition, 71.1% of respondents agreed with the statement "employees have the opportunity to do what they do best every day." More importantly, 89.5% of respondents agreed with the statement that "most employees feel they are treated with respect by their co-workers." In a staff survey of four administrative services departments (Facilities, Finance, Human Resources and Information Technology) from April 2009, 77.1% of respondents agreed with the statement that staff members in these departments "are courteous and helpful." Additionally, 78.2% of respondents agreed with the statement that these staff members "treat me with respect."

Staff has been able to use these survey data to develop work plans and generate goals for the coming year. These surveys also serve as a model and baseline for future surveys that are planned to be conducted on a regular annual basis.

- 28. Establish a training program for staff who have the responsibility of evaluating others that is focused on employee development, positive reinforcement, continuous positive interaction to build effective working relationships, setting clear expectations and how to coach, counsel, hold accountable, and recognize and reward the employees in creative ways for praiseworthy performance (Batchelor, Landers, Teichert, Haggard – April 2009). Recommendation 1d**

Completed Tasks: As reported to the Authority Board at the March 26, 2009 meeting, management, branch supervisors, unit supervisors and circulation supervisors received training on promoting the establishment of a culture that is built upon integrity, respect, courtesy and excellence. These training sessions were held in February and March. As follow-up to these sessions, these same groups of staff received additional training in April and May on five core areas: motivation, effective communication, developing win/win strategies, delegation, and recognition. Each staff member in attendance was asked to develop an action plan addressing each of these core areas. Such action will continue to maintain momentum in establishing the new culture of excellence. Additional follow-up sessions have been planned for June 2009.

- 29. Redesign the workplace in the administrative offices once the Human Resources function has been moved (Library Director, Teichert, Landers, Haggard – April 2009). Recommendation 226**

Completed Tasks: The Human Resources department was recently moved from the administrative offices on the fourth floor of Central Library to vacant office space on the second floor. This move resulted in available space in the administrative offices on the fourth floor. Facilities staff



May 28, 2009

Sacramento Public Library Authority

Agenda Item 4.1: Internal Assessment Progress

members are working with the Finance department to reconfigure their office space to maximize the efficient use of the vacant office space. Two staff members have already been moved to new space, and the remaining impacted staff will be moved by the end of May 2009.

THIS PAGE INTENTIONALLY LEFT BLANK