



January 28, 2010

**Agenda Item 4.2: Internal Assessment Progress**

**TO: Sacramento Public Library Authority Board Members**

**FROM: Rivkah K. Sass, Library Director**

**RE: Internal Assessment Progress**

**RECOMMENDED ACTION:** Receive and file.

**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 92% of the items contained in the Assessment. The remaining items are scheduled to be completed at various times, with the latest deadline being June of 2015. Because of the intermittent nature of the remaining due dates, progress reports will now be provided on a quarterly basis, with the next report being submitted in April, 2010.

This report contains information on assessment items due to be completed in November and December of 2009:

- 1. Expand library service in North Natomas by opening the new North Natomas Library (Ross, Freeman, Landers - Nov 2009). Recommendation 201**

Completed Tasks: The new North Natomas Library grand opening was held on January 9, 2010. The North Natomas Library is a joint use library, in cooperation with the Natomas Unified School District and Los Rios Community College District. The 22,645 square foot library features a community room, 120 public computers, two study rooms, a Career and Scholarship office, and a Friends of North Natomas Library Store.

- 2. Establish an online Capital Projects Standards and Specifications Manual to provide consistent, quick responses and up-to-date information for internal and external customers that interact with the Library (Ross, Tucker, Calderon - Dec 2009). Recommendation 218**

Completed Tasks: A Capital Projects Standards and Specifications Manual has been established and is available to staff for reference. Specifications that have been established for capital projects – for example, Information



Technology data and phone closet layout, Information Technology wiring specifications, toilet accessories, etc. – are identified and noted in this internal document. A Products Specification spreadsheet identifying models and price information for library standardized equipment includes a hyperlink to the product that can be sent quickly and easily to answer customer inquiries.

Next Steps: Establish procedural information for ongoing identification and continuous updating of the Capital Projects Standards and Specifications Manual and Products Specification spreadsheet.

- 3. Develop or provide access to a program for staff leadership development similar to Frontline Leadership. (Bagdassari - Dec 2009). Recommendation 93g**

Completed Tasks: Staff developed and implemented a Supervisory Training Program in 2007. The program has been placed on hold until completion of the assessment items.

Next Steps: Human Resources staff will update the program and review the feasibility of resuming training in fourth quarter 2009-2010.

- 4. Prepare a New Employee Orientation Handbook that will be given to all newly hired employees and posted on Human Resources' intranet page (PA 2-4; Bagdassari, Marketing, HR Team - Dec 2009). Recommendation 97**

Completed Tasks: A checklist currently exists on both Human Resources and Public Services intranet pages. A small team has been charged with reviewing the library's new employee orientation handbook and will make adjustments where necessary.

- 5. Investigate feasibility of using a software solution to facilitate tracking leaves (medical, WC, FMLA, CFRA, PDL, PFL etc). that will provide reports, reminders, notification letters and appropriate forms to employees. (Bagdassari, Viviano, Phipps, Ferrelli - Dec 2009). Recommendation 109**

Completed Tasks: Staff has added new leave codes to the library's enterprise system, and supervisors will be trained on how to use the new codes.

- 6. Improve customer service through enhancements to the Millennium customer database software:**



**Improve online catalog with software enhancements by adding images of Book Jackets and Reviews (Calderon, Smith – Nov. 2009). Recommendation 126b**

Completed Tasks: Through online experiences with book retailers such as Amazon, Barnes & Noble, and Borders, customers expect certain features when looking for books, movies, and music. To meet those expectations and provide a better overall experience, the library implemented Syndetics book jackets and reviews in the Online Catalog in November 2008. The content is also available in Encore. Book reviews come from various sources, including Booklist, Kirkus, The Horn Book, Publisher's Weekly, Library Journal, and School Library Journal.

**7. Consider removing fax machines from branches where they are no longer cost-effective (Calderon, Worthy, branch supervisors – December 2009). Recommendation 149**

Completed Tasks: Staff from the Information Technology department conducted a survey asking branch supervisors to consider removing fax machines from their branch. While the majority of branch supervisors have reasons for continued use of fax machines, five locations do want to have the units removed.

Next Steps: The results of the survey will be reviewed with branch supervisors. Fax machines will be removed from branch locations where they are not needed no later than March 2010.

**8. Explore putting podcasts for Dial-a-Story, Dial-a-Book and Telecuento online in order to offer another access point option for customers (Calderon, Brown, Strange, Wilde, Hernandez). Recommendation 284**

Completed Tasks: For many years, the Sacramento Public Library has offered children between the ages of 7 and 12 years old an option to hear great stories over the telephone. There is a strong desire by the Library to expand this service using podcasting technology to reach a generation of users who own computers and other Internet-ready appliances. A staff team met to further discuss the options for developing a program to record stories using podcasting technology. The group identified resource and equipment needs and requested advice from the Authority's legal counsel to determine if written permission is required from authors or publishers.

Next Steps: Upon review of recommendations from the Authority's legal counsel, staff will proceed to complete a report for review by the youth services coordinator. The report will include commitment of resources and technology requirements.



**9. Develop a comprehensive Strategic Plan for IT in support of the Library Strategic Plan and as a key element of the IT governance structure (Calderon – Dec 2009). Recommendation 120c**

Completed Tasks: At its February 2, 2010 meeting, the Information Technology Steering Committee will be presented with a planning process for developing a comprehensive Strategic Plan for IT. Key planning elements have already been compiled. Planning resources, such as the Library's Facilities Master Plan, Model for Service and other relevant documents will serve in developing the plan. The IT Steering Committee will determine activities to assess current conditions, technology trends and set priorities to align IT to Library service goals. The development of the Library's Plan of Service is tentative to start January 2010.

Next Steps: The Information Technology Steering Committee will determine the planning process, membership, determine planning activities and set a timeline for completion of the project.

**10. Track Dial-a-Story, Dial-a-Book and Telecuento calls to evaluate whether it is well used and should be kept the way it is, changed, or eliminated (Calderon – Dec 2009). Recommendation 285**

Completed Tasks: Staff reviewed the existing process used to record stories. Staff also reviewed monthly voice-mail line usage and costs. For the three services listed above, there were 8,109 callers during the four month evaluation process. On average, there were 2,027 callers per month.

Next Steps: The results will be shared with public service managers to determine support of the service.

**11. Establish the first Focused Service Facility at the George Sim Community Center (Tucker, Freeman, Landers, Ross - Dec 2009). Recommendation 203**

Completed Tasks: The City of Sacramento opened the remodeled and expanded George Sim Community Center on September 26, 2009. Integral to the main lobby space is 100 square feet allocated to Sacramento Public Library's first Focused Service Facility that includes the GoLibrary unit that allows customers to check out and return pre-stocked library books, along with an Online Public Access Computer for customers to access the catalog and databases.

Next Steps: Staff will evaluate the effectiveness after one year of operation to determine feasibility for expanding this type of service to other locations.



- 12. Collaborate with County staff to identify a complete funding plan to fund the new Rio Linda Library, currently in the plan development stage and slated for possible opening in 2012 (Tucker, Ross - Dec 2009). Recommendation 207**

Completed Tasks: Planning funds are in hand and have been used for conceptual architectural plans and site surveys. Enough funds remain to carry the conceptual drawings to design drawings or construction documents. Additional project funding is envisioned from future development impact fees on the Elverta Villages project which might start in 2012. Additional resources would be needed to complete the project and could be found in additional Tobacco Litigation Funds, a County-wide Library parcel tax, and donated funds. Staff will continue to work with County staff on future sources of revenue and on possible donor funds.

- 13. Coordinate ergonomic training for all staff with a goal of reducing our experience modification ratio and repetitive motion injuries (Tucker, Ferrelli - Dec 2009). Recommendation 213**

Completed Tasks: With the hiring of the Library's Safety Coordinator in August 2009, ergonomic training and worksite evaluation has increased dramatically. In addition, a complete Return to Work Program has been developed. The program works by temporarily modifying the employee's job or providing the employee with alternative work. The employee's medical condition, along with any limitations or restrictions given by the medical provider is considered as a priority when identifying the modified or alternative position. This will result in a speedy recovery, improved employee morale, and a financial savings to the Library as employees return to work sooner than anticipated and the ex-mod ratio goes down over a three-year cycle. Staff will continue to offer ergonomic training to employees on a regular basis and to ensure that employees know of the benefits of this training.

- 14. Create a database of programs for use throughout the system that will allow for the efficient distribution of economically viable ideas to staff in all branches. (Brown, Youth Services staff, Shaffer, Strange, Wilde, Benson - Dec 2009, ongoing). Recommendation 280**

Completed Tasks: The children's and adult program database, also known as "Program Finder", has been updated. Programs are added on a continuing basis and a process has been put into place to ensure that the Program Finder will be reviewed and updated quarterly. Programming staff will attend the next meeting of the adult services committee in February 2010 to inform staff about Program Finder and ask for continued input of new programs and reviews.



**15. Strengthen and maintain positive community relationships by:  
Attending Board meetings of the Downtown Sacramento Partnership and continuing to participate in shared projects (Biddle - Dec 2009). Recommendation 299a**

Completed Tasks: In 2009, the Central Library Manager regularly attended the Board meetings of the Downtown Sacramento Partnership and plans to continue this in the future. This involvement will help strengthen ties with the organization.

**16. Assess space utilization of the third and fourth floor storage areas and organize these areas to make optimal use of the space (Biddle, Higginson, Ward, Tolley - Dec 2009). Recommendation 302**

Completed Tasks: The third floor storage area, which houses Central's collection of periodicals, has been cleaned and organized. The collection was thoroughly reviewed, with some titles being weeded as appropriate, based on collection guidelines. This project was overseen by Librarian Gerry Ward.

The fourth floor "Inactive" area project is approximately 60% complete. Overseen by Library Supervisor Rebecca Higginson, the following has been accomplished:

- Criteria were delineated for collection items to be stored in Inactive.
- Librarians reviewed the collection and items were identified for weeding; the weeding is still in progress for some parts of the collection.
- Miscellaneous non-book materials that had accumulated over the years were cleaned out. Shelves were cleaned.
- Space was created for federal government documents that have taken 50% of the shelving in the public space on the third floor, and the move of these select documents into Inactive is also in progress.

Next Steps: Central staff will complete weeding of the Inactive collection and moving the documents into the space by December 2010.

**17. Restructure TELIS (Telephone Information Service and Circulation help line) to better serve patrons in a timely manner with the appropriate level of staff by:**

**Reducing the number of abandoned calls to less than 5% (Biddle - Dec 2009). Recommendation 297d**

Completed Tasks: Statistics from FY07/08 indicate an abandoned call rate of 11.2%. In 08/09 the rate dropped to 8.6%. Comparative statistics for the latter half of calendar year 2009 indicate a drop in the number of



abandoned calls to 7.8%. It is notable that the total number of calls to TELIS has been steadily increasing. The average number of monthly calls increased from 6,416 in Fiscal Year 07/08 to 8,031 in Fiscal Year 08/09.

Next Steps: In order to reach the less-than-5% goal in 2010, TELIS coordinator Ann Owens will shift her responsibility *full-time* to monitoring the TELIS line for quality control and tracking staffing to ensure it is adequate to meet the established goal. On January 16 all incoming callers will be channeled to one line, rather than being routed to "circulation" or "reference." Staff assigned will answer all calls, most of which are routine. Calls that require more in-depth service by a reference librarian will be transferred to a separate line. Staff continues to hone this service, with the ultimate goal of an information line with adequate staffing levels, tiered to more effectively and efficiently respond to SPL's callers.

- 18. Investigate the feasibility of acquiring a software program that will enhance the library's ability to track budgets and expenditures at the branch level by bridging between the Millennium accounting system for acquiring library materials and Eden Finance system. (Rokke, Johnson, Smith - Dec 2009). Recommendation 275**

Completed Tasks: Necessary software has been purchased from Innovative Interfaces in compliance with the Authority's Procurement Policy. The collection management staff has successfully pulled a data file from the Innovative acquisitions system in the format required by the Eden accounting system. The Finance department is in the process of mapping fields in the Innovative data to Eden system requirements.

Next Steps: Finance will complete the process of mapping fields. When that piece has been completed a schedule will be established for regular exporting of financial data from the Innovative acquisitions system into the Eden financial system.

- 19. Streamline the library's programming process (i.e. booking, promotional pieces, publicity, performer payment, calendar mentions, etc.) via a Web-based solution (Shaffer, Brown, Mijares, Cantin, Strange, Wells, Benson, Higgerson, Calhoun, Easterwood, Lalonde, Trawick - Dec 2009). Recommendation 243**

Completed Tasks: The Library has been working with its electronic calendar software to mine the data in effort to: better display it on branch web pages, add it to the locations' page in a unique and helpful fashion, as well as allow branches to display the information on video monitors within the branch. The new website allows branch staff to better promote programs, while the new e-newsletter features clickable links to popular branch programs that allow customers to view additional details and



register should they wish to attend. The Library has also launched a web-based platform for branch staff to order program publicity materials. This system has greatly reduced the turnaround time for print materials.

**20. Fully organize the administrative file area and assign primary responsibility for maintenance and tracking (McDonald, Puerner, Haggard - Dec 2009). Recommendation 20**

Completed Tasks: Staff has reorganized the administrative file area as part of general renovations in the administrative area, and primary responsibility for maintenance and tracking has been assigned to appropriate administrative staff.

**21. Complete the FY 2008/09 Audit and achieve a clean audit opinion (Johnson - Nov 2009). Recommendation 44**

Completed Tasks: On October 22, 2009 the Board received and accepted the Independent Auditors Report for the year ended June 30, 2009. Staff will maintain compliance with appropriate Finance policies and procedures in order to achieve timely fiscal closes in the future.

**22. Complete documentation of the accounts payable, cash receipts and revenue posting modules (PA 1-2A; Boerman, Elliott - Dec 2009). Recommendation 29k**

Completed Tasks: Staff has completed the Accounts Payable Policy and Procedures, which include a flow chart of A/P processes and a detailed checklist. Formal desk procedures associated with A/P processes are currently being developed. Cash receipt and revenue posting policies and procedures are also in process and are expected to be complete by January 31, 2010.

**23. Implement and enforce the budget control feature of the electronic purchase order and requisition system to identify transactions that exceed budgeted allocations (PA 1-3B; Johnson, Teichert, Tucker - Dec 2009). Recommendation 39**

Completed Tasks: The Eden financial system has a function that will disallow payments on accounts that exceed budgeted figures. Performance auditors were informed of the function and they subsequently advised that use of this function could assist the Library in maintaining fiscal accountability. The Library has implemented over-budget warnings for Finance staff, which can be overridden if necessary. Due to the intricacy and relationship of various Library funds and related departments, budget appropriations are occasionally loaded at the fund level and expensed on



the department level, which causes false budget warning messages in the financial system when no over budget condition exists.

Finance staff has begun the laborious task of account grouping to tie child department accounts to parent fund accounts for the purpose of eliminating false over-budget warnings. In the interim, it has been determined that activating the "disallow" function will result in costly payment delays and is not expedient for SPL at this time. Regular monitoring of actual to budget figures is an alternative solution. Since July of 2009, staff has implemented a monthly review and feedback process that requires managers to review monthly financial activity and report inconsistencies in posting and budget to actual variances ensuring that fiscal accountability is a priority for all department heads.

**Next Steps:** Staff will continue to determine and create account group relationships in the Eden financial system to accurately reflect parent to child account relationships and to eliminate false over-budget warnings.

**THIS PAGE INTENTIONALLY LEFT BLANK**