

To: The Board of Trustees, LaPorte County Public Library
 From: Nora T. Akins, Strategic Management
 Date: September 6, 2011 NTA
 Re: Evaluation of Organization

Nora's

The purpose of the evaluation project is to consolidate managerial roles and improve operational efficiencies to reduce the 2012 operating budget by \$500,000 without significantly impacting service delivery. The Board agreed on the eight questions submitted as an outline for the evaluation.

Question 1.

What standards tie to funding and/or accreditation?

The Library Standards were examined which include certification needs and service outcomes. See Appendix 1: Provisions to receive State funds.

Table 1 provides an overview of the provisions which directly impact the budget, current compliance and recommendations. There are three levels of standards. The minimum (Basic) standards are noted.

Table 1

Standards to receive state funds 590 IAC 6 Section 4	Requires	Current	Recommend
Full time qualified Director 590 IAC 5	MLS + supervising work of ≥ 2 MLS + 100 LEUs (10 in Tech)/ 5 yrs.	Fonda Owens qualifies and has been in the Interim position since October 2010.	Position is required
Expenditures for library collections exceeds 7.5% of operating budget 7.5% X 4.2 million = \$315,000 is a gross estimate.	The standard is based on a percent of the operating funds expended and is analyzed on a monthly basis. Fonda established that with reduction efforts made, 11.5% of the operating budget has been spent on collections as of 7/31/11.	An effort to reduce collections has taken place in 2011.	Reduce collections budget to 10% of operating budget. Establish a system-wide analysis of the collection's usage. Reduce the number of people directly involved in the selection process. Establish a system to recommend materials including a patron request system. Move purchasing to the Business Office. Move Cataloging to the Automation Department. Eliminate the management position of Technology Services.

Standards to receive state funds 590 IAC 6 Section 4	Requires	Current	Recommend
(7) Statewide service delivery minimum of 3 days a week	Keith Kuric, Circulation Department Head informed me that they recently moved from one day a week to two days a week. When I informed him the requirements was three days a week; he said he got out of it based on cost.	According to Wendy Knapp, Indiana State Library Professional Development Office, "there is no means to reduce the number of stops per week required by any library..." The library is not in compliance.	Increase the frequency of stops a week to be in compliance.
System-wide department or <u>branch head</u> requires a qualified librarian to provide programs and reference	MLS + 75 LEUs (10 in Tech)/5 yrs.	Fonda holds this position as well as Interim Director.	Elizabeth Johnson has stepped up to take on many responsibilities in Fonda's absence. I recommend she be promoted to this position should Fonda not be selected as Director. Sue Keeling would then transfer to Extension to provide clerical support on Mobile days.
Adult services requires a qualified librarian to provide programs and reference + space designated for adults		Deborah – Head of Reference holds MLS and provides programming	Should the Board decide not to promote Fonda to the Director position, I suggest transferring her to Adult services. Extension Services appear to have a more patron-centric philosophy. Adult Services need help in that area, plus being impacted by change.
Young adult services requires a qualified librarian to provide programs and reference + space designated for young adults		Monicah – Head of AV is designated as YA programming	Heather Vargas holds MLS in Children's Dept.
Children's services require a qualified librarian to provide programs and reference + space designated for children's services.		Susan + 1.5 others are qualified and provide programming for Children and Young Adults	

Standards to receive state funds 590 IAC 6 Section 4	Requires	Current	Recommend
An annual summer reading program for a minimum of 6 weeks at each location.	This year, Susan Bannwart was responsible for moving the system on-line, which reduced volunteer time, staff time and paper waste.	These run at each branch & main for 8 weeks and are not considered much of an expense. The State provides preparation concepts and suggestions. Friends of the Library funds the material cost for this project.	Summer assistance is required in Youth Services. Circulation doubles in off school months. Work-study is utilized currently.
Provide at least 5 library programs for every 1,000 people served per year.	$5 \times 65.8 = 329$ programs. Define program = each session.	18 qualified professionals are involved in programming. In 2010 we provided 1423 programs. More than 4 times the minimum.	Analyze the programs, staff time, cost, and attendance, by age group and topic. The purpose of programming should be to increase utilization of the collection and respond to community needs. Reduce the number of programs offered by 60% and increase the quality, focus and efficiency. Require pre-registration and minimum attendance.
Open a minimum of 55 hours per week, including 6 evening hours and one weekend day.		Main is open 61 hours, including 10 evening hours and one weekend day.	Maintain current hours.
One public access computer for each 2000 people served	$65.8/2 = 33$ public access computers	55 public access computers	Moving the computers to the current AV area will reduce staff time for "computer lab classes." Automated Services staff will be proximate and readily available to provide public service.

Question 2.

What indicators are currently in place to measure service outcome?

The Strategic Plan (See Appendix 2) is a response to the Indiana Public Library Annual Report. I challenge the Board to focus on two long-range objectives of the Annual Report:

142 a A statement of community needs and goals; and

142 b Measurable objectives and services respond to community needs and goals

Neither the mission, nor the vision directly incorporate community needs and goals:

Mission: La Porte County Public Library offers access to information and opportunities for lifelong learning, enrichment, and enjoyment.

Vision: La Porte County Public Library is that special place beyond home and work where people come to improve their lives, nourish their intellect, or simply to be entertained.

Of forty-one (41) objectives in the strategic plan, four (4) directly address community needs. The Strategic Plan lacks purpose and appears to be an internal duty roster. In addition, the accountability is frequently shared among departments and/or committees.

Question 3.

How else are quality and quantity of services evaluated?

See Table 1.

There are quality measures in place such as circulation, program evaluations and a patron feedback mechanism on the website. This project did not address how these measures are utilized.

Question 4.

What employee groups most directly contribute to the achievement of these goals?

See Table 1

Mirroring the Strategic Plan, accountability is spread across several people to select the collection, purchase the collection, catalog the collections and provide programming.

Table 2

Activity	Department	Person
Collection Selection	Adult	Deborah, John, Mary , Sarah
	Children	Susan, Heather, Stephanie
	Young Adult	Sarah and Mary
	AV	Monicah, Pete and Karen
	Extension	Alice, Elizabeth, Cherri, Fonda (historically)
	Databases	All selectors
Purchase Collection	Selectors	See above
	Main Library Manager	Brent - database purchase
	Automation for data bases	Rebecca to determine if it works
	Tech Services Ordering Clerk	Carol P – print
	Tech Services Ordering Clerk	Julie – non-print (AV)
	Tech Services Manager	Kym – electronic books, downloadable music and video

	Business Office	Melony & Cindy Dye (after invoicing is posted, obtain approval and issue checks)
	Coolspring	Alice – Does the selection and purchasing
Cataloging	Receivers	Jackie G – cataloger/invoicing Ruth – cataloging/invoicing
	AV processing clerk	Cassie - scans art work of cases, clean disc, labels, itemizes pieces for games
	Barcodes	Kate -barcodes, spine labels for books
	Physical processing Database	Suki – specialized – book repair Kym – database + all e-books Jan – covers for any position + supervises the day to day
Programming	Adult	Deborah, Kim, John, Mary
	Young Adults	Monica, Sarah, Mary
	Children	Susan, Heather, Stephanie
	Extension	Each branch supervisor with children as a focus; Cherri for adults and children + assisted living facilities + children

Question 5.

How are job descriptions linked to these services?

Job descriptions include selection and programming responsibilities.

Question 6.

What if anything must these employees do differently to support those services?

Statewide service delivery needs to be increased to three days per week.

A holistic need - based approach to the selection, staff training, and community training and marketing requires specific people to be accountable to a clearly defined purpose. [See Question 2.](#)

Question 7.

What barriers, if any, challenge employees to perform efficiently?

1. The three circulation departments within the Main Library more than doubles manpower needs. Despite the physical layout, the Audio Visual department can be moved from the basement to the main floor. Circulation has 6.6 FTEs of weekly coverage and AV has 6.7 FTEs of coverage. Should the AV department move to the main floor, the library can realize a savings of 7 FTEs.

The move will also create an area for the Computer Lab which will create efficiencies with troubleshooting from Automated Services, as well as computer classes.

There will be a cost associated with the move.

2. There is a lack of trust among staff which results in “work-arounds.” Rather than trusting the staff member who is responsible to serve the patron, staff contact those they trust to make sure the patron is served or do it themselves. This makes people insular and silos strong.
3. Convolutd procedures are in place. The selection process is one example. Fourteen professional staff are involved in selecting. Selection is separated out by patron population, type of media, such as print, non-print, AV and databases as well as fiction/non-fiction and even by portions of the Dewey Decimal System. The budget is set up in such a way that it requires budget adjustments to be made when too many biographies are purchased, for instance. This process has no impact on the quality of selection. It

slows the process down and involves many hands and meaningless work for the business office. Is it another example of lack of trust? It prevents autonomy and defers accountability.

4. The process to purchase databases is as convoluted in a different way. A collection of databases can be a direct link to responding to community needs and goals.
5. Job descriptions are organized by employee classification. Pages, Clerk I, Clerk II and Clerk III perform similar functions with increasing complexity. This structure is reminiscent of a union shop where one must wait for the correct classification in order for the task to be completed.
6. Staff scheduling is based on staff needs rather than patron volume or work volume in some instances.
7. Mary Hedge holds the mailing labels, writes the news releases and attends the County Tourism Bureau's monthly meeting. Mary is a Reference Librarian. She was the Community Service Librarian but has held on to these and perhaps other duties. These duties belong to Lisa Nielsen who has been given a title and lacks the authority to execute her responsibilities.

Question 8.

What job descriptions do not directly support required standards? What functions exist within these job descriptions? How did these job descriptions come about?

Maintenance doesn't directly support the standards, but it was felt a necessary position.

Pages have limited function within the library. This position is responsible for re-shelving, straightening and dusting primarily. Circulation staff may be better informed if they accept this responsibility. A \$63,000 savings in salary can be realized by eliminating this position.

Cost Saving Recommendations

1. Eliminate Department Heads and Page positions, restructure organization. See Appendices 3 -6.
2. Close Hanna Branch and extend Union Mills hours from 28 hours to 32 hours opening two hours earlier two days a week. To accommodate the coverage, transfer Hanna's Clerk III to a Clerk I position in the Union Mills branch, reducing her hours from 30 to 20; realizing a net savings of more than \$80,000.
3. Reduce collections expense. There is a reduction that started in 2010 being executed. Recommend reducing expense to exceed minimum standard by not more than 2.5%. See Appendix 7.
4. Do not renew OCLC subscription.
5. Do not provide benefits to part-time personnel, other than holiday pay. Over 170 days of vacation are paid for those working less than 30 hours a week, costing over \$14,000 a year. Eliminating PERF will save \$24,400. These savings are calculated with current staff in place.
6. Do not offer shift premiums; \$3725 was paid out in 2010.
7. Do not offer compensatory time.
8. Conduct a regional salary and benefit survey and revise wage and benefit administration, if deemed appropriate. Consider reducing the Clerk levels to two. Porter County has one level with one hourly wage of \$9.55. LaPorte County's average hourly wage of all Clerks is \$10.50, ranging from 8.25 to 14.75 (Branch Librarian).
9. Consider moving to a Paid Time Off system, rather than sick, personal and vacation. This transition may be helpful should the Board decide to reduce the number of paid days off, as it provides greater flexibility. A review of State and County government offices follows:

Agency	Vacation										Sick	Personal
	< 1 Year	>1 year	> 2year s	> 5 year s	> 8 year s	> 10 year s	> 15 year s	> 20	> 25	> 30		
State	6	12		15		20		25			6	3
County	0	5	10		15		20	25			12	0
Library		10		15		20			25	30	12	2+2 sick
Certified	20	20							25	30	12	2 +2

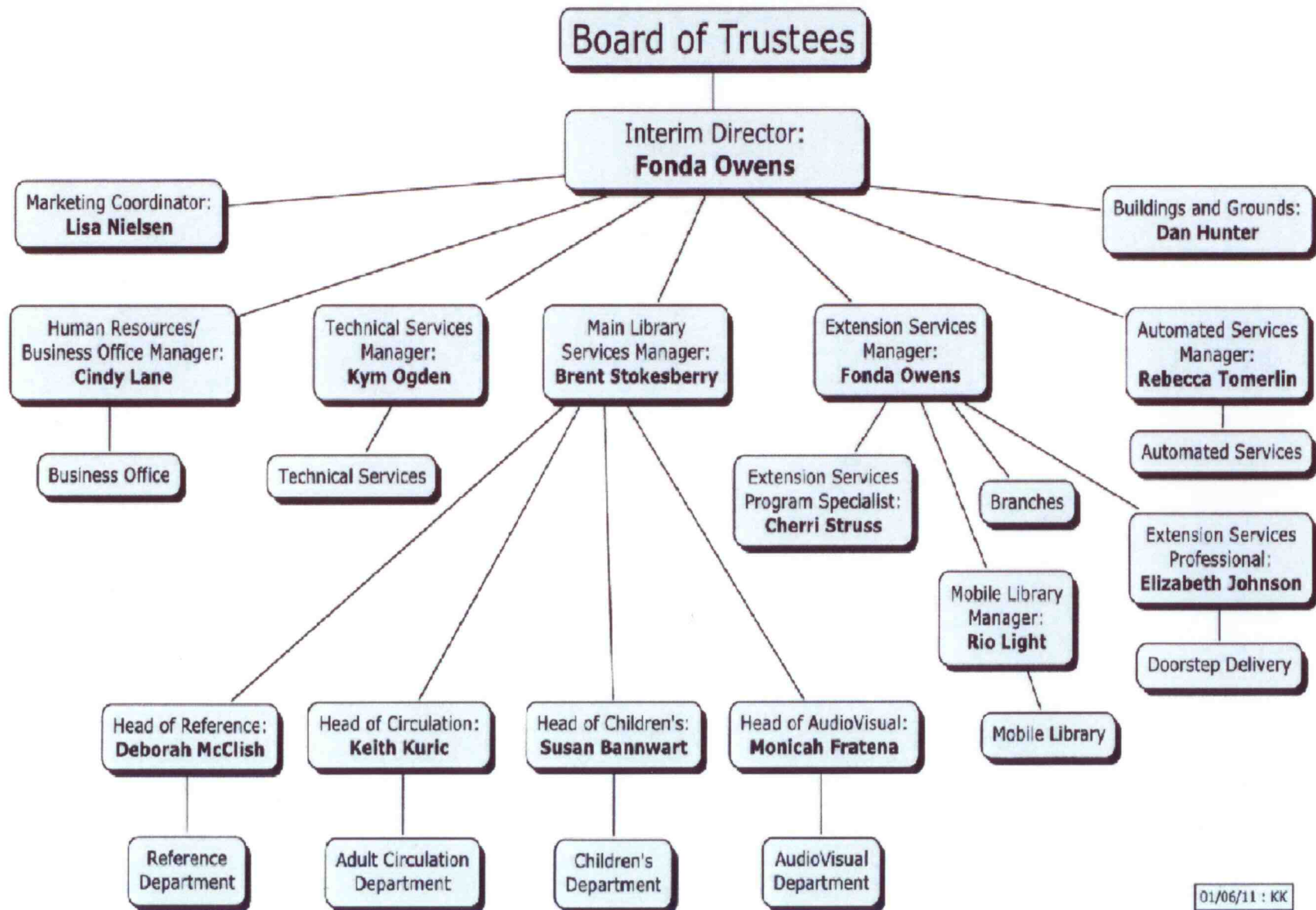
10. Technical Services has 7.4 Full Time Equivalents (FTEs). Reduce FTEs by 35% or 4.8 FTEs.
11. Reduce postage cost. Utilize postage for overdue notices only. Encourage patrons to register their email address for notices. Mail announcements via postal service only by special request.
12. Replace \$24,000 cleaning service with PT Janitor, saving more than \$14000.

Closing Thoughts

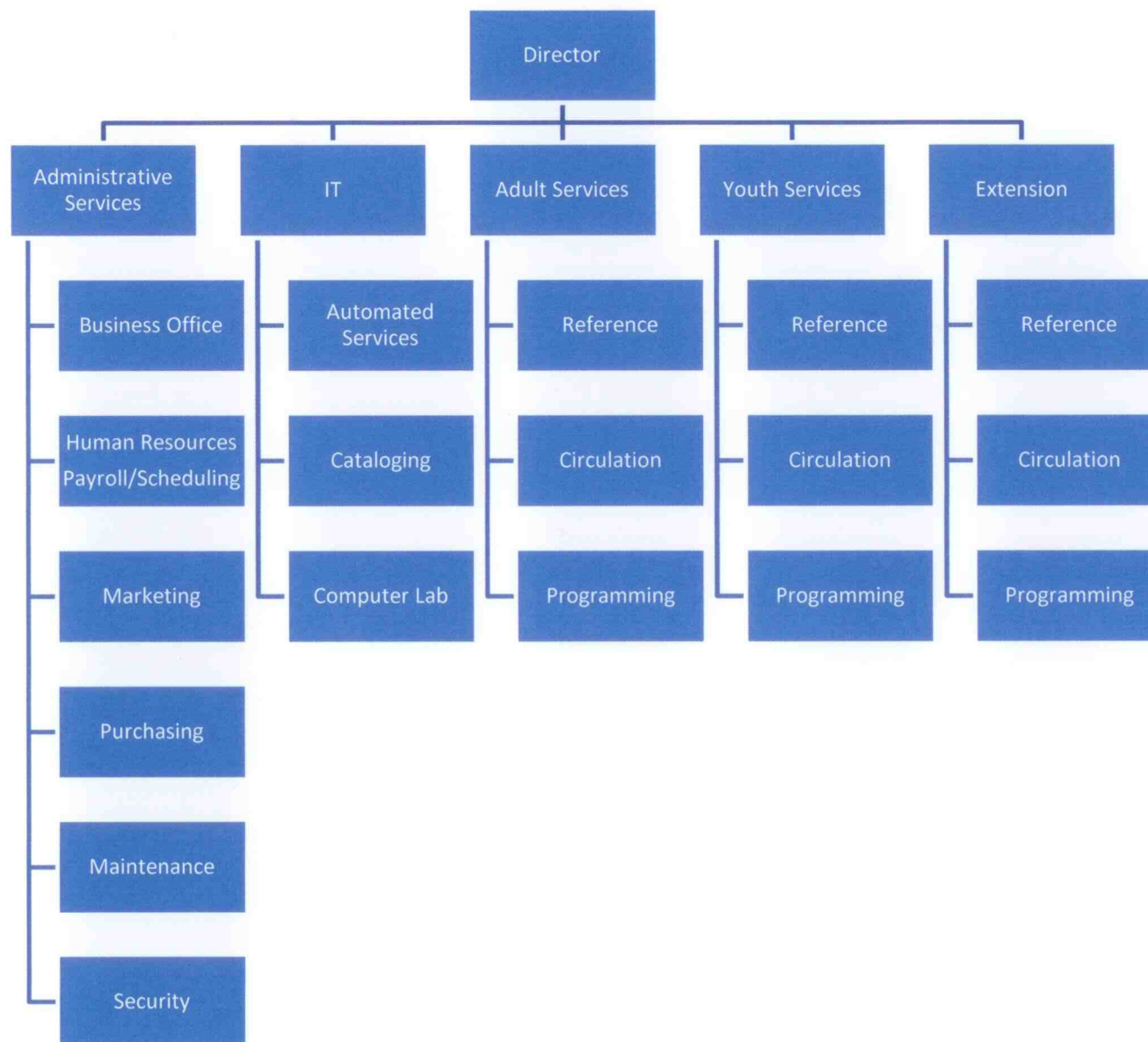
The culture is strong. I was most impressed by Extension and Children's Services. Each of these departments was passionate about service delivery. Their common element was providing full service. For example, AV is located in the Children's department and everyone operates the Circulation desk. The silos built over years have allowed people to hide behind classifications and not accept personal responsibility.

The Strategic Plan must be a starting point to direct all Library staff toward the purpose of public service. It's up to the Board to define what service that is.

LaPorte County Public Library Organization Chart



Appendix 4



LaPorte County Public Library

Summary of Proposed Savings

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	Employment Information					Salary, Wages, and Benefits					Net
	DOH	Yrs of Srv	Department	Position	FTE	Base Pay	Vacation	Sick	PERF	Taxes	(Incr)/Decr to Budget
Eliminate OCLC Licence Fees											19,881
Reduce Collection Expenditures to 10% of Operating Budget											115,638
Eliminate Hanna Branch (Non-Personnel)											83,864
Bring Janitorial Svs In-House .5 FTE and Eliminate Custodial Service Contract (Net Savings)											14,943
Reduce Postage Costs											10,000
Personnel Changes											
Fish Lake											
Mazzorana, Dennis	09/16/04	7	Maintenance		0.25	4,534	292	234	455	422	5,937
Hanna											
Thomas, Casey	05/16/07	4	Ext Svs	Page	0.25	3,451	145	174	339	314	4,423
Zimmerman, Jennifer	05/27/09	2	Ext Svs	Clerk III	0.25	5,070	630	0	1,597	558	7,855
Main											
Galloway, Isiah	12/21/09	2	Adult Circ	Page	0.25	3,451	145	174	339	314	4,423
Kuric, Keith	11/29/05	6	Adult Circ	Head - Pro II	1.00	39,374	0	0	3,839	3,306	46,519
Moser, Ashley	06/15/07	4	Adult Circ	Page	0.28	3,796	160	191	373	346	4,866
Pruden, Debbie	01/05/04	7	Adult Circ	Clerk I	0.80	15,425	0	0	1,504	1,295	18,224
Russell	09/27/99	12	Adult Circ	Page	0.80	13,062	0	0	1,274	1,097	15,433
West, Debbie	10/04/88	23	Adult Circ	Clerk III	1.00	29,494	0	0	2,876	2,476	34,846
Hines, Josiah	08/02/10	1	Auto Svs	Clerk III	-0.13	(2,720)	0	0	0	(208)	(2,928)
Fratena, Monicah	09/18/06	5	AV	Head	1.00	42,016	0	0	4,097	3,528	49,641
Keehn, Jessica	06/08/04	7	AV	Clerk I	0.15	2,387	154	123	240	222	3,126
Kobos, Billie	02/28/00	11	AV	Clerk I	0.80	17,372	0	0	1,694	1,459	20,525
Lanham, Michael	09/18/06	5	AV	Page	0.25	3,378	218	174	340	314	4,424
Schroeder, Ashley	11/09/07	4	AV	Page	0.28	3,796	160	191	373	346	4,866
Browder, Savannah	12/07/09	2	Children's	Page	0.38	5,176	218	261	509	472	6,636
Kmiec, Rebecca			Children's	Page	0.38	5,655	0	0	509	472	6,636
Stokesberry, Brent	12/11/00	11	Main	Manager	1.00	63,003	0	0	6,143	5,290	74,436
Dotson, Patti	08/22/00	11	Marketing	Clerk II	0.38	6,018	1,130	863	1,822	752	10,585
Morrison, Sarah	03/17/09	2	Reference	Pro I	1.00	34,008	0	0	3,316	2,855	40,179
Cho, Suki	09/06/88	23	Tech Svs	Clerk I	0.50	10,078	884	530	983	954	13,429
Gaddy, Jacque	05/12/99	12	Tech Svs	Clerk I	0.10	2,953	158	95	288	267	3,761
Jeffrey, Kate	09/05/06	5	Tech Svs	Clerk I	0.30	5,510	848	678	1,433	648	9,117
Ogden, Kym	06/18/07	4	Tech Svs	Manager	0.20	20,920	0	0	2,040	1,756	24,716
Plante, Carol	11/08/00	11	Tech Svs	Clerk III	1.00	24,274	0	0	2,367	2,038	28,679
Spence, Ruth	02/17/87	24	Tech Svs	Clerk I	0.50	11,072	971	583	1,136	1,053	14,815
Rolling Prairie											
Buell, Dick	09/06/94	17	Maintenance		0.38	8,112	712	427	833	771	10,855
Union Mills											
Spevak, Rebecca	06/08/11	0	Ext Svs	Page	0.25	3,596		174	339	314	4,423
Eliminate PERF for Part-Time Employees									15,806	1,209	17,015
Eliminate Shift Premium						3,725				285	4,010
Eliminate Vacation for Part-Time Employees							7,467			571	8,038
Eliminate Sick for Part-Time Employees								8,862		678	9,540
Total Savings					13.58	387,986	14,292	13,734	56,864	36,174	753,376

						Appendix 7	
Collections Analysis							
2011	Annual Appropriation	7.50%	1/11 - 6/30/11	Balance	at 10%	at 12%	Savings
Books	339,696.77		97,526.98	242,169.79			
Periodicals	30,062.00		1,278.98	28,783.02			
Non- Print	247,945.09		77,463.20	170,481.89			
DB	95,000.00		18,497.15	76,502.85			
Total	712,703.86		194,766.31	517,937.55			
Total Operating	4,198,353.86	314,876.54					
Actual Operating	1,619,474.93		194,766.31				
Actual Annualized	3,238,949.86		389,532.62		323,894.99		65,637.63
2012 Estimate	2,738,949.00				273,895.00		115,637.62
						328673.88	60,858.74