

# 2020 Annual Plan

December 12, 2019



This document constitutes the 2020 Pueblo City-County Library District (PCCLD) Annual Plan. It includes current information and analysis regarding the Library District and a list of objectives and action steps intended to help ensure its success in 2020 and beyond.

## BACKGROUND

PCCLD continues to receive very positive recognition for exemplary engagement with the community it serves. The Library District was designated a national Four Star Library for the third consecutive year late in 2018, a selection based upon widely recognized industry standards and reserved for the top three percent of institutions from among 7,361 public libraries in the United States. PCCLD was awarded the prestigious National Medal for Museum and Library Service during the summer of 2018. The Library District was elected as America's Best Public Library in a national people's choice competition earlier in 2018.

These accolades for PCCLD are demonstration of its success and serve as a foundation for important current year activities. The most notable of these may be the special community engagement efforts on the part of PCCLD representatives. These included multiple focus group events conducted with stakeholders at every library throughout the county, numerous one-on-one meetings with most local elected officials and many other community leaders, and a great many presentations and other outreach activities on behalf of PCCLD. Polling conducted earlier this year affirmed that a large majority of Pueblo County citizenry hold PCCLD in high esteem and enjoy positive engagement with the institution. The poll attests that a preponderance of community members consider the Library District among the best and most trusted local institutions. It also showed they value PCCLD for specific reasons:

- The special programs to help children read, learn to think, and be entertained in a positive, productive way.
- The free and open gathering places to read, use the Internet, and interact with friends.

- The ongoing addition of best-sellers, classics, and movies free for all.
- The provision of new information technology such as e-books, audiobooks, and free downloads.
- The increasing services to the aging population.
- The ongoing refreshing and renovating of libraries to maintain them as comfortable spaces for reading, studying, and learning.

PCCLD's broader aims and interests are outlined in its long-range strategic planning document: *Curating Connections: Pueblo City-County Library District 2016-2020 Strategic Planning Initiative*

([http://www.pueblolibrary.org/sites/default/files/2015\\_strategicplan.pdf](http://www.pueblolibrary.org/sites/default/files/2015_strategicplan.pdf)). This document, which was adopted by the institution in 2015, has helped set the current path forward for libraries locally in calling for special attention to these six areas:

- Creating young readers
- Strengthening community partnerships
- Bridging the digital divide
- Data-driven planning
- Serving the whole family at all stages of life
- Lifelong learning beginning with staff.

More recently, PCCLD completed a new comprehensive facilities master plan in 2019. This report is entitled *Pueblo City-County Library District: Library Facilities Master Vision* (June 2019,

<https://www.pueblolibrary.org/sites/default/files/pdf/PCCLDLibraryFacilitiesMasterVisionPlans.pdf>). The 154-page study documents the current conditions and future guidance for maintaining and updating the seven library buildings in the county. The process utilized to develop the report's recommendations included engagement with Library District stakeholders to explore concepts relevant to standards for contemporary library services in order to better support the mission of PCCLD in the modern age. This

project was overseen by two nationally-prominent library design firms, Humphries Poli Architects and HBM Architects & Interior Designers. The final recommendations include concepts intended to refurbish the seven libraries according to state-of-the-art practices and maintain the integrity of the buildings. It includes cost estimates for accomplishing this and an implementation timeline. The execution of this report's vision along with the separate PCCLD *Library Replacement Plan* (pp.A2-A72,

<https://www.pueblolibrary.org/sites/default/files/pdf/PCCLDLibraryFacilitiesMasterVisionPlans.pdf>), much of which also was updated in 2019, will ensure significant library physical assets will remain pertinent and up-to-date for years to come. Accomplishing these plans will go a long way toward helping guarantee PCCLD's relevance for this generation and the next in providing the best possible library service to local citizens.

PCCLD also continues to endeavor to achieve designated key results. These include promoting increased use of digital services and traditional collections plus working to ensure more customers visit district libraries to read, study, learn, and participate in library-sponsored cultural and educational events and activities. Delivery on these are important measures of the organization's vitality and success.

To these ends, PCCLD completed a number of projects in 2019 with positive impact on its performance. These include, but are not limited to, a significant reinvestment in its software and information telecommunications delivery infrastructure and Internet services, the modernization of its Integrated Library System and the online searching tool that provides user interface for finding library collection materials and resources, a significant increase in on-site security services and protocols to better ensure comfortable and safe learning environments in library settings, the addition of more current resources in support of e-circulation, the improvement of its industry-leading public programming services, and focused attention on print resources such as the *Re-Acquaint Yourself with the Classics* project implemented toward year-end and previews a significant increase in investment in books to commence in 2020.

All the factors outlined above confirm the importance of PCCLD's dedication to planning, accountability, and service plus strong support for the institution from the community it serves. PCCLD's mission to provide the best possible library service for local residents relates directly to the aforementioned activities and tactics, strategic goals, and key results. PCCLD will strive in 2020 to implement specific objectives in further support of these.

The objectives and action steps delineated below are intended to do this. They are the end product of a planning process involving participation by PCCLD stakeholders, including employees, Trustees, Friends of the Library, and the Pueblo Library Foundation. The resources available in support of this plan are further enhanced by the recent voter approval of Pueblo County Ballot Issue 6B, which will help alleviate PCCLD revenue challenges, which were mostly caused by a combination of the detrimental impact on property tax collections for libraries due to certain provisions of Colorado's Gallagher Amendment and the expiration in 2019 of a modest local mill levy dedicated to libraries.

Each 2020 objective is listed in alphabetical order below and accompanied by action steps intended to facilitate their accomplishment. The list is not intended to be a comprehensive list of all that will happen at PCCLD in 2020. Rather, it includes those objectives that, to the best of our knowledge, represent significant new initiatives for 2020 along with others identified with notable bearing on institutional resources. This annual planning document is the outcome of much consideration and effort, and provides positive direction for the District in fulfilling its overarching aim to provide the best possible public library service to the community.

**Q3 NOTE:** The COVID-19 global health pandemic has caused significant disruption in PCCLD operations in 2020, including in work on objectives set forth in the 2020 Annual Plan. One would be hard pressed to overstate the impact on library operations of the public health emergency, which has included, but is not limited to, an extended closure of all facilities and mandates for consequential changes in personal behavior to protect everyone's health due to the contagion. This has diverted significant Library District attention and effort in responding to the unprecedented consequences of the changes to library operations dictated by the community health threat posed by the spread of the

virus and the danger it poses. PCCLD has successfully reopened a number of services this year to date, since fully closing for more than one month beginning in March, and institution revenue remains strong thanks in some measure to the positive election outcome of PCCLD ballot measure 6B in November 2019 and several 2020 grants and gifts including significant support from both the Packard Foundation and the Coronavirus Relief Fund (September 17 2020).

## 2020 OBJECTIVES

- I. Accomplish revision and expansion of Finance policies so PCCLD's guiding practices are current and up-to-date.

~~Sherri Baca~~ Alexandria Romero

### Action Steps

1. Review current policies and compare with those of similar institutions and best industry practices.
2. Revise and write Finance policies to ensure PCCLD's governance and activities are optimal.
3. Work with the Library Trustees to adopt and implement new policies.

Q3 Update: This project is delayed until 2021.

- II. Adopt policy aligned with new state legislation to better protect library user personal information.

~~Jon Walker~~

### Action Steps

1. Review legislation requirements and relevant current PCCLD policy.
2. Write policy aligned with recommended principles and best practices.
3. Seek approval from the Board of Trustees for implementation and follow through on this.

Q3 Update: PCCLD legal counsel has reviewed this matter on behalf of PCCLD and policy update proposals are forthcoming in Q4.

- III. Carry out the recent library market wage study by beginning to make salary adjustments in order to better ensure that PCCLD attracts and retains the best and brightest employees.

~~Terri Daly~~

### Action Steps

1. Analyze study findings within the context of PCCLD budgetary opportunities and limits.
2. Devise proposal for changes to current compensation for relevant jobs.
3. Communicate compensation alterations to affected employees and update those salaries.

**Q3 Update:** Study findings have been analyzed and recommendations for changes to compensation have been accepted. The process of completing pay changes and communicating this information is nearly complete with final steps to occur for the final group of employees effective January 2021.

IV. Commence the implementation of the PCCLD master facilities plan (*Pueblo City-County Library District: Library Facilities Master Vision*) to ensure library physical facilities are kept fresh and up-to-date in support of contemporary library services.

**Sherri Baca**

### Action Steps

1. Select architectural design firm and construction contractor to commence year one of the plan.
2. Complete relevant construction and design drawings and plans.
3. Put plan into action with construction and FFE procurement.

**Q3 Update:** Financial planning for the renovation project is progressing well with PCCLD bonds set for issuance via underwriter Stifel, Nicolaus & Company in October 2020 with resulting proceeds used to substantially fund the renovation. The design teams Anderson, Mason, Dale Architects and HBM Architects are retained and schematic design has commenced. A CM/GC firm has been selected to oversee an anticipated twelve-month construction project slated to commence in 2021 and complete in 2022.

V. Complete building security assessments using Homeland Security standards in order to better ensure safe library environments.

**Sara Rose Amy Nelson**

### Action Steps

1. Employ certified security assessment agency and determine timeline for work.
2. Review each site, respectively, to understand current vulnerabilities and develop a plan for desired changes.
3. Make changes and assess outcomes for each site.

**Q3 Update:** PCCLD is in contact with qualified agencies to schedule this security review with the work to carry-on into 2021.

VI. Conclude design and fabrication of the *Exploring Steel, Energy and the West* museum exhibit development utilizing Xcel Energy grant funds, and commence traveling exhibition.

**Jon Walker**

### Action Steps

1. Work with contractors to finalize exhibit design.
2. Authorize fabrication, oversee production, and review final exhibit.
3. Open traveling exhibition by summer of 2020 at the Rawlings Library.

**Q3 Update:** Exhibit design and fabrication is complete and delivered with the Rawlings Library Special Collections and Museum Services Department overseeing the exhibition schedule with the first show preparing now for opening in Q4.

VII. Conduct an analysis of the costs and benefits of going "fine free," ceasing or limiting overdue materials fines to reduce access barriers to Library District services.

**Jill Klevan**

### Action Steps

1. Review current "fine free" practices at peer libraries.
2. Consider opportunities and challenges for implementing changes at PCCLD.
3. Make final recommendations about this practice, implement, and evaluate.

Q3 Update: The analysis is underway with a recommendation report expected early in Q4.

VIII. Consolidate Information Technology servers and continue to expand utilization of Cloud services in order to lower costs, improve performance, and better guarantee reliability.

**Robert Childress**

**Action Steps**

1. Procure and configure new server equipment.
2. Thoroughly test systems.
3. Migrate applications and data to new server and Cloud platforms, and evaluate outcomes.

Q3 Update: A new high-end computer server is operating and older server repurposing is underway. Migration of staff desktops to current operational software and hardware is underway now with completion scheduled in Q4. A new backup appliance and operational protocols are in place as are additional Cloud services.

IX. Continue to foster Maker or “learning by doing” activities within the Library District in support of lifelong learning.

**Sara Rose Amy Nelson**

**Action Steps**

1. Institute selected upgrades to Maker equipment, facilities, and programming.
2. Establish partnerships with like-minded institutions in support of Maker.
3. Monitor activities and assess results.

Q3 Update: PCCLD is an active participant in the Pueblo “Maker” community and discussions underway now for partnership with local schools on the proposed Rawlings Library makerspace upgrade, which is to be part of that facility renovation.

X. Design and conduct a capital fundraising campaign.

**Nick Potter**

### Action Steps

1. Formulate a campaign in collaboration with the Pueblo Library Foundation to provide financial support for implementation of the Master Facilities Plan.
2. Reach out to philanthropic individuals and organizations for grants and gifts.
3. Assess results and adjust, as necessary.

Q3 Update: The first-year \$375,000 in required matching funds have been raised effective Q2 allowing collection of \$125,000 from the National Endowment for the Humanities. These funds, and others, have come via significant gifts from private individuals as well as philanthropic organizations including, but not limited to, the Rawlings Foundation, the Packard Foundation, the Southern Colorado Community Foundation, USAC Erate, and the Colorado Coronavirus Relief Fund. Additional potential supporters have been identified and work has commenced for more grants and gifts.

XI. Develop the pilot PCCLD Online University into a primary method for staff development so Library District employees have ready access to current practices.

**Sara Rose** Sherri Baca

### Action Steps

1. Test new system with select training activities.
2. Expand curriculum to include areas such as youth services, special collections, and adult programming.
3. Monitor participation and analyze impact.

Q3 Update: PCCLD University is up and running with a catalog of more than fifty online classes using the Google suite to deliver content, including Meet and Classroom. A PCCLD lead trainer is overseeing the program. PCCLD's phased reopening in light of the public health crisis has served as a useful opportunity to leverage PCCLD-hosted online learning.

XII. Evaluate the current credit card merchant process and implement changes to PCCLD's fee collection program to ensure it is current and cost effective.

**Sherri Baca** Alexandria Romero

### Action Steps

1. Review costs and benefits of current program.
2. Solicit information from vendors on alternatives.
3. Make informed change or maintain existing program.
4. Perform analysis of results and make desired changes.

**Q3 Update:** This project has commenced but will continue into 2021.

XIII. Examine the collection inventory maintenance processes and address changes to improve accuracy of library catalog of holdings.

**Jill Kleven**

### Actions Steps

1. Review current inventory maintenance processes.
2. Identify areas for cost-effective change and improvement.
3. Implement modifications, inform and train staff, and assess impact.

**Q3 Update:** PCCLD took advantage of the COVID-19 closure to complete a full inventory of the library collections throughout the district. Finishing details are underway now and should be completed by year-end.

XIV. Execute foundational revision to pieces of the Library District's marketing efforts in order to better promote programs and services.

**Nick Potter**

### Actions Steps

1. Review and renovate PCCLD newsletter layout and distribution.
2. Grow utilization of social media and other digital marketing tools.
3. Consider a Library District rebranding effort.
4. Evaluate and implement changes, and report on results and recommendations.

Q3 Update: A program plan is prepared although the COVID-19 crisis has hampered implementation and further work is needed on the rebranding project.

XV. Explore use of improved ILL modules to improve PCCLD Inter-Library Loan services and increase user access to books and materials.

**Jill Kleven**

**Action Steps**

1. Survey ILL marketplace for best solutions.
2. Seek partners to pilot selected applications.
3. Assess outcomes.

Q3 Update: Testing of the ILL module in collaboration with a statewide library consortium has commenced.

XVI. Finish updating Information Technology policies so guidance is current and up-to-date.

**Robert Childress**

**Action Steps**

1. Review current policies and compare with peer institutions.
2. Assess pertinent best practices.
3. Write policies aligned with PCCLD's interests and activities.
4. Work with Trustees to adopt new policies and assess outcomes.

Q3 Update: This project is delayed until 2021.

XVII. Implement a PCCLD smartphone app to increase access to library services and programs.

**Nick Potter**

**Actions Steps**

1. Review apps in the marketplace and PCCLD's needs.
2. Contemplate a pilot program and configure software.
3. Implement and evaluate results.

**Q3 Update:** The Communico software platform has been selected and procured for this purpose, and training and implementation is anticipated to complete before the end of the year.

XVIII. Increase PCCLD's support for the Friends of the Library and Books Again bookstore.  
**Sherri Baca** **Alexandria Romero**

Action Steps

1. Check-in with the Friends on desired support activities.
2. Evaluate PCCLD capacity for helping in designated areas.
3. Start activities and assess outcomes.

**Q3 Update:** PCCLD is conducting Friends of the Library (FOL) monthly bookkeeping tasks in collaboration with the FOL Board of Directors. PCCLD is on-track to complete a bookkeeping procedure manual for the FOL Books Again store before end of the year.

XIX. Investigate a consortium catalog with Pueblo School District 70.  
**Jill Kleven**

Action Steps

1. Engage with School District 70 in establishing a new instance of the Koha ILS to build upon current ConnectED project.
2. Appraise costs and benefits to PCCLD.
3. Set in motion desired programs and evaluate impact.

**Q3 Update:** This project has been suspended for now due to the pandemic and related considerations.

XX. Plan for the future provision of excellent local library services by formulation and adoption of a new PCCLD strategic plan.

**Sherri Baca**

**Action Steps**

1. Identify a process for updating the current strategic plan.
2. Include in the planning process consideration for community and stakeholder input, local demographics, current public library best practices, and present and projected library resources.
3. Employ necessary resources to complete the new plan.
4. Seek adoption and communicate to interested parties.

**Q3 Update:** A core committee was established early in the year along with an action plan and work assignments. The process is well underway at this time with key reports due early in Q4 and final work to complete before year-end.

XXI. Refresh specific fund assets in accordance with PCCLD needs and the Capital Replacement Plan.

**Alan Rocco**

**Action Steps**

1. Identify capital assets to replace.
2. Procure and install new assets.
3. Gauge results.

**Q3 Update:** A number of capital improvements were identified for 2020, including a new work truck, flooring at the Lamb Library, parking lot reseal at three facilities, and a number of painting projects throughout the District. The truck is on-order and scheduled for delivery by Q3, parking lot resealing was completed in Q2, painting projects are mostly complete, and Lamb flooring work is scheduled for Q4.

XXII. Return materials expenditures to fifteen percent of budgeted operational costs by spending more on books and provide increased access.

Jill Kleven

Action Steps

1. Identify dollar amount to appropriate.
2. Determine materials to procure in alignment with PCCLD practices and community desires.
3. Acquire materials and determine impact.

**Q3 Update:** The materials budget was increased to the goal amount following voter approval of PCCLD ballot measure 6B in November 2019, and materials procurement to-date is on target with notable increases in spending on digital materials to meet needs for remote access in light of the COVID-19 public health emergency.

XXIII. Review and update the Use of Materials and Collection Development Policies of the Library District.

Jill Kleven

Action Steps

1. Revise current policies.
2. Review updates with stakeholders.
3. Seek Trustee approval.
4. Communicate newly adopted policy documents.

**Q3 Update:** This project has been delayed although preliminary review has begun.

XXIV. Revise the telecommunications network topology with consideration for improved reliability and flexibility.

Robert Childress

Action Steps

1. Employ industry expertise to devise proposed topology.

2. Create and implement work plan to instigate revisions.
3. Review and report on outcomes.

**Q3 Update:** This objective is delayed to 2021.

XXV. Revitalize the *All Pueblo Reads* book selection process to create greater community engagement.

**Nick Potter**

**Action Steps**

1. Solicit interested parties to participate in the selection process.
2. Organize key players to select a book aligned with PCCLD goals and objectives.
3. Work to obtain local visit from author as keynote for 2020 All Pueblo Reads.
4. Appraise outcome.

**Q3 Update:** A new selection committee was seated and the 2020 book/author selected. Programs are scheduled throughout October with significant adjustment due to the public health crisis.

XXVI. Seek funding from the Colorado Department of Education and/or the Colorado Department of Higher Education to build capacity for sustaining and growing the successful PCCLD Career Online High School pilot project to help local adults finish high school.

**Jon Walker**

**Action Steps**

1. Identify likely grant funders and community partners.
2. Seek collaboration and support from interested institutions.
3. Implement project and determine impact.

Q3 Update: The program has not made expected progress in 2020 and the State of Colorado has reduced available funding due to budgetary shortfalls. PCCLD is pursuing possible funding opportunities and partnerships.

XXVII. Test and implement a texting application to expedite employee notification in the event of emergency closures or related operating hours changes.

**Sara Rose** Amy Nelson

Action Steps

1. Test application provided by the Special District Association.
2. Define procedures for use and train employees.
3. Implement project and assess outcomes.

Q3 Update: An application has been established for testing among PCCLD administrators and managers from throughout the District.

XXVIII. Update the PCCLD Information Technology Capital Replacement Plan to ensure appropriate future upgrades and support for critical IT systems.

**Robert Childress**

Action Steps

1. Complete evaluation of current Information Technology Capital Replacement Plan inventory.
2. Revise acquisition calendar in alignment with current best practices and projected needs.
3. Communicate new plan to stakeholders and assess fiscal impact.

Q3 Update: This objective is delayed to 2021.

XXIX. Utilize information from the recent library election to analyze strengths and weaknesses in library programs and services.

**Jon Walker**

Action Steps

1. Obtain detailed results of November 5, 2019, library ballot measure.
2. Review data to determine where PCCLD's activities are robust and where frail.
3. Devise plans to improve services based upon analysis.
4. Consider methods for implementing desired changes.

**Q3 Update:** This work is expected to occur in Q4.

XXX. Support the Pueblo Library Foundation's expansion of its Leadership Institute with support from local philanthropic organizations in order to foster development opportunities for Pueblo County youth.

**Nick Potter**

Action Steps

1. Support the Foundation's initiative to grow the Leadership Institute.
2. Gauge opportunities to leverage this program with PCCLD's mission.
3. Review the implemented changes for positive juxtaposition with PCCLD.

**Q3 Update:** The pandemic has impacted the program although it is important to report that the Packard Foundation is on-board as a major supporter and additional funding support is being identified. A recent Packard grant to procure hundreds of laptops and hotspots for the neediest local students connected with the Department of Social Services, CASA, Boys & Girls Club, and Pueblo Posada is considered an attribute of the revamped program.

XXXI. Work with the Pueblo Latino Chamber of Commerce and other partners to administer the Southern Colorado Youth Entrepreneurship Series (SoCo YES!) to foster and encourage a culture of entrepreneurship and achievement among young people in the region.

**Jon Walker**

Action Steps

1. Await decision of request for funding support.
2. With grant funds begin project aligned with application guidelines.
3. Determine results of first year of project.

**Q3 Update:** The grant application was unsuccessful and the project is on-hold.