

2018 Annual Plan

January 2, 2018



**PUEBLO CITY-COUNTY
LIBRARY**
Ideas • Imagination • Information

The Pueblo City-County Library District (PCCLD) recently was nominated for the prestigious 2018 National Medal for Museum and Library Service. This follows PCCLD's receipt of the *Library Journal's* renowned Star Library award in 2016, which places the local public library among the top three percent of all public libraries in the United States. These types of recognitions affirm the dedication to planning, accountability, and service by those who are intimately involved in the work of the district plus strong support for the institution from the community. Such work continues with this presentation of the PCCLD 2018 Annual Plan.

PCCLD's current strategic plan

(http://www.pueblolibrary.org/sites/default/files/2015_strategicplan.pdf) helps set the current path forward for libraries locally in calling for special attention to these six areas:

- Create young readers
- Strengthen community partnerships
- Bridge the digital divide
- Data-driven planning
- Serve the whole family at all stages of life
- Lifelong learning begins with staff.

These areas of focus offer guidance for this 2018 annual planning document. The PCCLD team also continues to endeavor to achieve designated key results, including seeking to increase use of digital services and traditional collections plus ensuring 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. PCCLD's progress in its mission to provide the best possible public library service for the community relates directly to these strategic areas of focus and institutional key results. PCCLD will strive in 2018 to implement specific objectives in support of the stated areas of strategic focus and key results.

The aspirations outlined below in this plan are intended to do this. They are the end product of a planning process involving participation by PCCLD trustees, managers and administrators, and employees. The planning exercise integrated contributions from vital PCCLD partners, such as the Friends of the Library and the Pueblo Library Foundation. This 2018 Annual Plan incorporates specific objectives identified as priorities at a special work session of PCCLD stakeholders conducted on September 6, 2017, including these consensus items: maintaining a capital contingency fund, providing funding to replace district servers and maintain current computer software, accommodating a robust programming budget, ensuring replacement of the Lamb Library roof, improving Sunday staff coverage processes, replacing the Barkman Library book drop, and filling expanded staffing needs for the Books In the Park program. Finally, this plan takes into consideration current PCCLD's financial circumstances and revenue projections for 2018.

Objectives representing new initiatives for 2018 are delineated in the following pages along with those identified with notable bearing on financial resources. Listed in alphabetical order, each objective is accompanied by action steps intended to facilitate accomplishment. This annual plan document is the outcome of much consideration and effort, and provides positive direction for the district in moving forward to fulfill its mission to provide the best possible public library service to the community.

- I. Complete a process to select the best, lowest-cost providers for PCCLD wide-area network telecommunications and Internet services for all library locations to ensure high quality digital services.

Charles Hutchins

Action Steps

1. Issue a Request for Proposal (RFP) for desired services.
2. Ensure alignment with federal E-rate funding requirements.
3. Award contract(s) to best, lowest-cost vendor proposal(s).
4. Implement services and assess outcomes.

Q1: A bid process was completed for telecommunications and Internet services. Transition to new services has commenced and is scheduled for completion by July 1.

Q2: PCCLD migrated to new Wide-Area Network (WAN) and Internet Service Provider (ISP) on July 1. This includes faster speeds for much of the WAN, moving from a 1 gigabit per second service to 10 gigabits per second. The ISP also is faster, changing from 400 megabits per second to 1 gigabit per second. The upgrades include new equipment for the network, such as switches and a firewall.

- II. Conclude the update work on the employee policy manual to help make sure that PCCLD provides a winning workplace.

Sherri Baca

Action Steps

1. Update policies including employee input and vetting by human resources and legal experts.
2. Review policies with PCCLD Trustees and seek approval.
3. Inform and educate employees on updated policies.

Q1: The Human Resources Manager is compiling data on recommended changes for upcoming presentations to various stakeholder groups—PCCLD administrators and managers, employees, and the Board of Trustees.

Q2: The Human Resources Manager continues preparation work on this project.

- III. Conduct an RFP process for PCCLD courier services so that collection materials and supplies are well delivered among all library locations in a cost effective manner.

Jon Walker

Action Steps

1. Assess courier service needs.
2. Develop and publish RFP to solicit interest from potential qualified vendors.
3. Review proposals received from qualified proposers.
4. Award service contract, implement, and assess outcomes.

Q1: The courier service has been incorporated into an organization change set to commence in Q2, which brings the courier service in-house as part of PCCLD's new Security Services Department.

Q2: Courier services are successfully operating now via in-house resources as part of PCCLD's new Security Services Department.

- IV. Constitute an exercise for redesigning PCCLD website navigation for a great library customer online experience.

Midori Clark

Action Steps

1. Assign a committee of internal stakeholders to research and make recommendations on current site navigation features.
2. Report findings and recommendations.
3. Assess and initiate actions considered to be in the best interest of the institution.

Q1: This initiative is scheduled to commence with guidance from the PCCLD Marketing Committee in Q2.

Q2: A timeline and project plan have been written. An oversight committee is being formed to start work in Q3.

- V. Consummate work to adopt a PCCLD core values statement.

Sara Rose

Action Steps

1. Identify a committee of internal stakeholders to serve as committee members for this work.
2. Review prior work on district cultural beliefs and values.

3. Work with stakeholders to collect information on commonly shared institutional values and draft a statement for review.
4. Develop and implement a communication plan for incorporating the values statement at PCCLD.

Q1: This work is scheduled to commence in Q2.

Q2: Branch managers have worked through an exercise with their respective staff teams to identify core values. Additional work is pending.

- VI. Continue to ensure the long-term fiscal well-being of the institution in consideration of results of assets valuation (Objective XXVIII), space planning projects (Objective XVIII), and the PCCLD ten-year financial forecast.

Sherri Baca

Action Steps

1. Determine long-term PCCLD financial requirements aligned with strategic goals.
2. Analyze impact on PCCLD financial resources of the Colorado State Constitution's Gallagher Amendment, local library mill levy, and other revenue sources.
3. Work with Board of Trustees to develop a project action plan.
4. Implement agreed-upon strategy in concert with community stakeholders.
5. Assess outcomes.

Q1: Currently monitoring and maintaining projections on the effects of the Gallagher Amendment and proposed PERA legislation, and sharing information with Board of Trustees and PCCLD leadership about developments and avenues of action. Participating in biweekly Special Districts Association legislative updates and meeting regularly with Front Range Library Finance Officers.

Q2: PCCLD continues monitoring and maintaining projections on the effects of the Gallagher Amendment and PERA legislation. PERA legislation in 2018 had minimal impact on PCCLD financially but will impact payroll procedures. PCCLD is plugged-in now to state legislative activities regarding Gallagher.

- VII. Convene a study of PCCLD hours of service to ensure optimal access to library resources in consideration of budgetary constraints.

Jon Walker

Action Steps

1. Assign a committee to do research and make recommendations.
2. Report on committee findings.
3. Initiate action(s) considered to be in the best interest of the institution.

Q1: The committee has been commissioned and members selected. Their work will commence in Q2.

Q2: The committee work is on-hold at this time. A specific study of hours-of-service at the Library @ the Y is underway with recommendations expected by year end.

- VIII. Develop a program to ensure optimal space utilization of the Rawlings Library and possible needs such as potential expansion of the Lucero Library and/or a new library on Pueblo's growing north side.

Jon Walker

Action Steps

1. Draft an RFP for desired services by qualified professionals and award contract to best, lowest-cost proposal.
2. Work with the selected firm and local stakeholders to determine desired space plans and costs at Rawlings Library to include increasing support for local history and archives, literacy tutoring, group study, learning by doing.
3. Assess opportunities and costs for expansion of the Lucero on Pueblo's east side.
4. Assess opportunities and costs for an additional library on Pueblo's north side.
5. Write an action plan aligned with PCCLD fiscal resources.

Q1: A Rawlings space planning RFP has been issued with responses due early in Q2.

Q2: Humphries-Poli Architects/HBM Architects now commissioned to oversee a study of the Rawlings Library interior space utilization and design. Their work commences early in Q3 to continue through Q4.

- IX. Employ a qualified firm to perform security services for PCCLD to help support safe conditions for individuals at the library.

Sara Rose

Action Steps

1. Act on the results of the 2017 PCCLD RFP for security services.
2. Contract with firm and implement desired services.
3. Assess outcomes of the new service and make adjustments, as required.

Q1: A Security Services Committee was commissioned, reviewed submittals in response to an RFP, and recommended an in-house solution moving forward. The recommendations were approved by the Board of Trustees and is being implemented now. New service set to commence May 1.

Q2: Security officers have been hired, trained, and the team is operating successfully now.

- X. Enact a solution to increase visibility among local citizens pointing search engine results to PCCLD events and collection holdings in order to increase use.

Jill Deulen

Action Steps

1. Work with on a pilot project to increase discoverability of PCCLD materials, events, programs, databases and services in local web searches via standard Internet search engines.
2. Gauge results and determine future steps.

Q1: DiscoverLocal is in the process of configuration and implementation at this time. This software will promote specific PCCLD holdings and events to search engines such as Google. Expected launch in Q2.

Q2: The linked data company continues to work to implement the DiscoverLocal platform, although preliminary results of the pilot have been disappointing.

- XI. Enhance summer programming with an end-of-summer parade celebration and expanded Books in the Park program.

Midori Clark

Action Steps

1. Provide budgetary and staffing resources to engage desired services.
2. Work with stakeholders on any recommended changes.
3. Execute modifications and evaluate.

Q1: Date for the end of summer program is set for August 11 and stakeholders now being notified. Expansion of hours for Books in the Park is approved.

Q2: There are eleven early entries so far for the end-of-summer Kids' Parade, which will take place in Q3. Books in the Park expanded hours is successful with an outcome report forthcoming in Q3.

- XII. Ensure early childhood literacy computers are updated and well maintained to help ensure a positive learning experience for the library's youngest customers.

Charles Hutchins

Action Steps

1. Provide funding to replace and/or maintain PCCLD early childhood literacy computers.
2. Procure replacement devices and contract with provider for support services for all devices.
3. Appraise the program

Q1: Inventory of systems completed and warranty extension now in place.

Q2: Childhood literacy computers are operating well with one device in warranty repair at the end of Q2.

- XIII. Evaluate internal processes to best leverage PCCLD's access to E-rate funds.

Sherri Baca

Action Steps

1. Review current E-rate consultant contract and the marketplace for these services.
2. Prepare E-rate RFP for consulting services.
3. Compare consultant service responses with internal capacity for carrying out these activities.
4. Employ appropriate resources to apply for future E-rate funding.

Q1: Terminated contract with E-rate consultant in favor of internal staff oversight. The internal E-rate team has completed application for funding and awaiting notification for over \$200,000 in requests for 2018.

Q2: PCCLD's new internal E-rate team successfully secured funding for the 2018-2019 grant cycle—totaling over \$200,000.

- XIV. Execute a project aligned with industry standards to improve archives administration and collection management functions and provide web access to archival finding aids to increase digital and reference access to PCCLD archival collections.

Sara Rose

Action Steps

1. Complete a contract to procure an application for management of archival documents.
2. Ensure proper training support for the archive curation team.
3. Implement the project in alignment with industry standards to provide web access to PCCLD archives, manuscripts, and digital objects.

Q1: ArchiveSpace archive management software has been procured, configured, and the first collection established.

Q2: Aaron Ramirez, Archivist Librarian, was hired in Q2 and is now working with ArchiveSpace software to develop collection management tools.

- XV. Facilitate participation of Pueblo County middle schools and high schools through a formal process to increase usage of library resources aligned with the new ConnectEd initiative.

Jill Deulen

Action Steps

1. Constitute PCCLD team delivering services.
2. Develop expected goals and outcomes.
3. Coordinate faculty continuing education.
4. Issue ConnectEd accounts to school faculty.

Q1: A survey is under development for school faculty to gauge use of library resources. Survey to be issued in Q2.

Q2: A survey is currently under development to distribute to classroom teachers in Q3 regarding public library services.

- XVI. Film a new PCCLD video to better support library promotion and development activities.

Midori Clark

Action Steps

1. Survey all library staff for stories about the library.
2. Select staff stories that highlight the library's mission and conduct in-person interviews with those staff to further flesh out the stories.
3. Interview selected staff on camera.
4. Review video and write a script.
5. Edit video according to script.

Q1: A video was produced and featured as part of the America's Best Library promotion (<https://youtu.be/4w2edpHLqFM>). Additional work is pending for Q2.

Q2: PCCLD received a special opportunity with the IMLS National Medal of Museum and Library Service to incorporate high quality National Public Radio StoryCorps production of PCCLD stories into promotion and development recordings. Work on this commenced in Q2 and will continue into Q4.

- XVII. Finish the Integrated Library System RFP process begun in 2017 to support customer service and staff efficiencies.

Jill Deulen

Action Steps

1. Review responses to RFP.
2. Determine leading respondent.
3. Negotiate contract agreement.
4. Implement service and appraise outcome.

Q1: A committee is evaluating five responses to PCCLD ILS RFP and is on track for recommendation in Q2.

Q2: PCCLD decision to migrate from SirsiDynix to Bywater Solutions Koha was approved in Q2. Migration process has commenced with "go live" date for Koha ILS scheduled for December 17.

- XVIII. Guarantee library information technology needs are met by replacing worn hardware and software with necessary new back-up servers, security cameras, and Microsoft Software Assurance.

Charles Hutchins

Action Steps

1. Select and procure recommended equipment and software.
2. Develop implementation plans and carryout.
3. Evaluate results.

Q1: Soliciting now for competitive bids for Microsoft Software Assurance and backup software. Security camera analysis is underway with expected completion in Q2 .

Q2: Windows 10 and Office 2016 software recommended for licensing with deployment to occur in Q4. Security camera replacement analysis completed with additional cameras scheduled for procurement and installation in Q3.

- XIX. Implement new banking services in concert with new vendor to obtain best financial services for the district.

Sherri Baca

Action Steps

1. Complete contract with selected vendor.
2. Commence services.
3. Assess and adjust, as required.
4. Review purchase card and credit card merchant services.

Q1: Banking services transitioning from Wells Fargo to Bank of the San Juans (Glacier Bank) is progressing well. Most changes are complete with streamlined procedures implemented.

Q2: All major banking accounts at Wells Fargo are closed and Bank of the San Juan systems are working well for PCCLD. Two minor accounts for online and credit card payments will migrate to the Bank of the San Juans in conjunction with new ILS implementation near year end.

- XX. Improve employee benefits with the addition of health benefit for part-time library staff.

Sherri Baca

Action Steps

1. Scan marketplace for desirable opportunities.
2. Vet options with employees and administration.

3. Implement and assess outcomes.

Q1: This objective is complete. New part-time benefits offerings are implemented, although continuing to scan for additional benefit offerings.

Q2: PCCLD is contemplating further improvements including migration to online open benefits enrollment in Q4.

- XXI. Increase circulation by implementing a temporary, one-time fine forgiveness (amnesty program).

Jill Deulen

Action Steps

1. Analyze the financial impact.
2. Consider the impact of returned materials to the collection.
3. Determine a timeline for the project.

Q1: A timeline to conduct the program in Q4 has been agreed upon.

Q2: The amnesty program is on hold and will be revisited in 2019 in deference to current ILS migration effort.

- XXII. Keep PCCLD supervisors up-to-date on best management practices by providing a series of training classes.

Sara Rose

Action Steps

1. Research supervisory management training opportunities.
2. Review options, adopt calendar of classes, and provide training.
3. Appraise outcomes.

Q1: The first workshop is scheduled to take place on May 9. It will be provided by Employers' Council on the topic of *Leading Teams*. Participants will include all current PCCLD supervisors plus a cohort of supervisors-in-training. Subsequent training sessions are pending.

Q2: *Leading Teams* workshop presented by Employers Council held on May 9 for all PCCLD managers and a group of "managers-in-training." A class is scheduled to take place July 12 for managers-in-training cohort and for all managers and managers-in-training on September 18.

- XXIII. Modernize and improve selected hardware systems to include Special Collections microform reader/printers, public copier/printer coin acceptors, Community Relations copier/printer, and self-check stations.

Charles Hutchins

Action Steps

1. Investigate best procurement options.
2. Conduct RFP processes, as appropriate.
3. Enact selected services and evaluate.

Q1: Two microfilm scanners have been upgraded and remaining systems to be replaced in Q2. Upgrades to self-check stations is undergoing testing now with pilot system at Rawlings.

Q2: Self-check upgrades remain in testing phase as we resolve some minor issues. Implementation schedule remains on-track to update remaining 21 self-checks in Q3. Remaining older microform reader/printers also on-track to replace in Q3.

- XXIV. Offer current customer self-services by upgrading public meeting rooms and events software management applications.

Midori Clark

Action Steps

1. Work with software vendor on implementation timeline.
2. Educate staff on new processes.
3. Migrate from old system to new.
4. Assess new system performance and adjust, as needed.

Q1: Transition process has commenced with new software configured, staff training underway, and scheduled for implementation in Q2.

Q2: The new meeting room and events software is operating successfully.

- XXV. Overhaul selected facilities infrastructure to include Rawlings Library exhaust dampers and parking lot lights; Lamb Library air conditioner, roof, and basement lighting; a staff work van; the Barkman Library book drop and parking lot seal coating; and the Pueblo West Library parking lot lights.

Jon Walker

Actions Steps

1. Investigate best procurement options.
2. Conduct RFP processes, as appropriate.
3. Install selected products and services, and evaluate.

Q1: Lamb HVAC units have been replaced, a new van has been ordered, and Pueblo West parking lot lights installed. Other work is pending.

Q2: Rawlings Library parking lot light upgrade is underway. Proposals for Rawlings Library exhaust dampers are being solicited. Barkman Library parking lot overlay is complete. Other work pending.

- XXVI. Pilot the Career Online High School program aligned with the state and national grant guidelines in support of lifelong learning for community members.

Jill Deulen

Actions Steps

1. Work with the State Library on current grant-funded program.
2. Consider outcomes and desirability for continuing project.
3. Implement recommended steps.

Q1: Thirty state-funded scholarships have been awarded and an additional ten are funded. The first graduates of the program are expected in Q2.

Q2: PCCLD received a \$30,000 grant from the Colorado State Library about one year ago to pilot the adult online high school program in our community. Five diploma recipients are scheduled to graduate in July with forty students currently enrolled. Another five-to-six students on-track to graduate in September. The pilot is considered a success and the Colorado State Library recently awarded PCCLD another \$25,000 in support of the program.

- XXVII. Plan to automate vendor payment processes for collection materials in order to improve efficiency and reduce opportunity for clerical error.

Sherri Baca

Actions Steps

1. Review and document current procedures.
2. Communicate needs to PCCLD ILS and accounting software vendors.
3. Develop technical data exchange protocols.

4. Test data interchange and resolve discrepancies.
5. Implement and assess outcomes.

Q1: The objective is on-hold awaiting the outcome of the ILS RFP process.

Q2: We have selected a new ILS and the migration process for accounting applications will occur in Q3. Connecting these information systems will be deferred to a future year.

- XXVIII. Produce a PCCLD repository of organizational knowledge to improve institutional achievement.

Midori Clark

Action Steps

1. Research the Digital Curation Centre's Curation Lifecycle Model and select areas of focus for PCCLD.
2. Convene a team of PCCLD experts and stakeholders to work on the project.
3. Develop project mission, milestones and timeline.
4. Launch the repository.

Q1: Preliminary planning is underway with a committee to be seated in Q2.

Q2: No update at this time.

- XXIX. Review results of the PCCLD Performance Evaluation Review Committee recommendations and consider changes to current program, including PERA review of the Pay for Performance program.

Jon Walker

Action Steps

1. Conclude work of Performance Evaluation Review Committee.
2. Review committee recommendations.
3. Adopt recommendations aligned with PCCLD mission, policies, objectives, and resources.
4. Assess outcomes.

Q1: The committee has commissioned an employee survey to occur in Q2 with remaining work to follow.

Q2: PERA review of Pay For Performance is underway now with recommendations likely in Q3. The committee, working with a consultant, conducted an employee survey to determine effectiveness of Pay For Performance with results under review now.

- XXX. Update the library capital replacement plan to ensure long-term funding is sufficient to maintain attractive, well-maintained facilities and equipment throughout the district.

Sherri Baca

Action Steps

1. Employ a firm to review and update the inventory of capital assets, including the replacement value of these assets and their life expectancy.
2. Update existing capital replacement plan.
3. Consider funding requirements to support the plan.
4. Implement funding strategies in line with Board of Trustees expectations.

Q1: Work is scheduled to commence in Q2.

Q2: Work will commence upon the completion of the asset valuation project, which is currently in the initiation phase.

- XXXI. Upgrade PCCLD's accounting applications to secure strong financial program.

Sherri Baca

Action Steps

1. Survey marketplace to determine best solution for PCCLD.
2. Adopt timeline for migration to new software.
3. Implement and assess outcomes.

Q1: Work is scheduled to commence in Q2.

Q2: We are finalizing the scope and pricing for the project, and plan to upgrade accounting software, asset management software, and purchasing software in Q3.

- XXXII. Wind up development of custom planning documents reflective of the unique neighborhoods served by each library outlet.

Sara Rose

Action Steps

1. Continue work with each location manager to develop individual plans.
2. Action steps to include community surveys, focus groups, demographic analysis, resources audit, and library trends consideration.
3. Write plans for each branch.

Q1: Work sessions on this project are set for Q2 and Q3 using Dynamic Planning Institute model.

Q2: The first three workshops are complete. Topics covered to date include Values, Mission, Community Needs, and Vision. Participating managers are on-track to complete individual branch plans before year end.

- XXXIII. Work with the Board of Trustees to select a financial auditor for PCCLD offering the best, lowest-cost service to provide the annual financial audit for the institution.

Sherri Baca

Action Steps

1. Develop a RFP soliciting qualified audit firms.
2. Issue RFP, receive, and evaluate responses.
3. Contract with firm to commence with audit of 2018 PCCLD financials.

Q1: Work is scheduled to commence in Q2.

Q2: The Audit Services RFP was released in Q2 with proposals due early Q3. The goal is to select an auditor in Q3.

- XXXIV. Wrap up work on Information Technology policies to ensure best IT practices.

Charles Hutchins

Action Steps

1. Review policies from other similar institutions.
2. Write updated policies for PCCLD.
3. Solicit approval from the Board of Trustees.
4. Communicate outcomes to PCCLD stakeholders.

Q1: A draft of new Internet and Computer Use Policy is under review now.

Q2: IT policies draft revision continues under review.