

**Analysis of LSSI's
Riverside County Library System Operation
For FY 1997-98 And FY 1998-99**

**By
Ruth M. Metz, Consultant**

Scope of Work

On May 30, 1999, Gary Christmas, County Librarian commissioned me to conduct an independent review of LSSI's performance as the library services provider for Riverside County. The review was to be conducted within prescribed time and budget limits. Specifically, I was to assess the level of library service provided against the set of performance measures and standards in the contractual agreements, FY1997-98 and FY1998-99, between Riverside County and LSSI.

Assessment Process

With the County Librarian, I identified measurable performance areas and standards of the contracts. I also interviewed the County Librarian and Library Administrator and LSSI representative, Gordon Conable. In addition, I interviewed Mid-South Zone Manager, Beth Ziegler and Desert Zone Manager, Barbara Bowie, the available branch managers and several staff during site visits to seven libraries in three zones June 11-13, 1999. I also reviewed the information and data provided by the County Librarian. Exhibit A lists the documents and reports I reviewed.

As stated above, site visits and interviews of staff were limited to a two-and-a-half day visit. I interviewed 20 staff and managers in all. My questions were meant to elicit feedback, especially to help evaluate the last two performance standards in my Exhibit B. These have to do with provisions 1.1 and 1.2 of the contracts. Respectively, these call for "the diligent provision of services as set forth..." and providing "labor to perform services in a complete, skillful and professional manner." Neither standard had specific, quantifiable measures stated in the County's contracts with LSSI.

Findings

Overall, LSSI has improved library services to County residents in comparison to the year prior to its first contract with the County. The RCLS libraries are open more hours per week and more days of the week. Staffing has increased and stabilized. The materials budget has increased. The balance of hours, staffing and materials budget has improved and stabilized across the zones and the system as a whole.

The attached Exhibit B, *Performance Measures and Standards Worksheet* provides a snapshot of actual performance in comparison to the required performance of the contracts. Virtually all of the performance measures and standards are being met, with minor exception.

The exception is the reporting system. While there is an abundance of data being collected, the data is not necessarily being reported as prescribed by the contract's Exhibit G, that is, by zone, system, or branch or by the prescribed coverage period, that is, monthly, quarterly, annually.

LSSI has done well to ramp up services as quickly as it has and to achieve the level of stability for the public with improved and reliable hours of operation and familiar staff faces throughout the system.

- In the first year of the contract, both hours and days of service increased in RCLS as a whole by over 22%, with hours jumping from 602 hours to 740 per week. Even with the withdrawal of Moreno Valley, the total hours of service in the system exceed the contractual obligation in both contract years.
- Systemwide, paid staffing increased by nearly 75% in the first year of the contract. Even with the withdrawal of Moreno Valley, staffing remains well above the 1996-97 fiscal year, showing an increase over that year of 57%.
- An estimated 90-95% of staff from the 1996-97 fiscal year was reportedly retained by LSSI.

LSSI and the County Librarian appear to be effectively leveraging the improved level of county library services to build local community support for even more library services. There are numerous examples of partnering

in building facilities, collections, programs and funds for local library enhancements. A library foundation has been established and is active. There are many active friends-of-the-library groups. There are volunteers actively providing service enhancements, like Internet training for the public.

Working for LSSI received very favorable comment from the managers and staff interviewed. Those individuals with whom I spoke unequivocally evaluated LSSI, after two years, as an improvement over the previous employer relationship. The major distinctions are noted in my comments under the last two performance standards of Exhibit B.

Planning for library services is making steady progress. The *Assessment Report of the Riverside County Library System, 1998*, not only fulfilled the contract specifications in 1997-98 but went further to identify *service responses* on a community-by-community basis. This is excellent groundwork for the local community planning processes that will begin to happen in the next contract year. Further, the *Assessment Report* recommendations have been seriously considered and acted on by the County. One of those actions has been to improve the Riverside County Network. The LSSI agreement to provide a capital contribution of \$200,000 has been directed toward improving the network effectiveness.

Submitted with Exhibits A, B and C June 23, 1999

Documents Reviewed in the Assessment of LSSI Operations

- County contracts with LSSI, FY 1997-98 and FY 1998-99
- Request for Proposal for Administration and Operation of the Riverside County Free Library System, 4-7-97
- *Assessment Report of the Riverside County Library System*, April 1998
- Riverside County Library System Report and Recommendations on the *Assessment Report of the Riverside County Library System*, April 21, 1998
- California Public Library Report 1998 for Riverside County Library Service
- A copy of the current branch schedule showing hours of service
- A spreadsheet showing LSSI staffing levels from May 1998 and May 1999 by zone
- A summary sheet showing the total of materials expenditures to date
- Copies of contracts with the courier services which subcontracted with LSSI in both fiscal years
- December 1998 monthly and quarterly reports sampler
- A summary statement of bids received from book jobbers and pages from their quotes showing the discounts offered
- A list of Riverside County Library Foundation directors, the Foundation by-laws and mission statement
- A census of workstations/terminals being supported in the Riverside Library Network
- A copy of the DRA assessment of the automated system and their upgrade recommendations
- A copy of a report to the County Librarian showing the breakdown of LSSI's \$200,000 contribution to the county library system

Performance Measures & Standards	Contract requirements FY 1997-98 And FY 1998-99	Actual performance
Hours of service	FY 1997-98 <ul style="list-style-type: none"> • West Zone: from 180 to 218, (7 outlets) • Mid-South: from 184 to 222, (9 outlets) • Desert Zone: from 192 to 256, (9 outlets and 1 bookmobile) FY 1998-99 <ul style="list-style-type: none"> • West Zone: 178¹, (6 outlets) • Mid-South: 224, (9 outlets) • Desert Zone: 280, (9 outlets and 1 bookmobile) 	FY 1997/98:² <ul style="list-style-type: none"> • West Zone: 224, (6 outlets) • Mid-South: 253, (9 outlets) • Desert Zone: 263 (10 outlets, including 1 bookmobile) FY 19998/99: <ul style="list-style-type: none"> • West Zone: 184, (6 outlets) • Mid-South: 260, (9 outlets) • Desert Zone: 271, (9 outlets and 1 bookmobile)
FTE Staff	FY 1997-98 <ul style="list-style-type: none"> • 42.7 West Zone • 29.7 Mid-South Zone • 38.9 Desert Zone Total: 111.3 FY 1998-99: <ul style="list-style-type: none"> • 27.0 West Zone • 29.7 Mid-South Zone • 37.9 Desert Zone Total: 94.60 for 24 outlets and 1 bookmobile	FY 1997/98: ² <ul style="list-style-type: none"> • West Zone: 44.21 • Mid-South: 37.54 • Desert Zone: 32.98 Total: 114.73 FY 1998/99:³ <ul style="list-style-type: none"> • West Zone: 33.45 • Mid-South: 31.10 • Desert Zone: 40.87 Total: 105.42 for 24 outlets and 1 bookmobile
Library Materials	FY 1997-98 \$60,000 per zone includes appropriate processing costs selection requires Co Librarian approval	FY 1997-98 <ul style="list-style-type: none"> • \$60,000 obligation met in each of the three zones • not known if processing costs are included • selection is routinely reviewed by the County Librarian

¹ Moreno Valley withdrew from RCLS

²from June 1998 report to the State Library

³as reported by LSSI to County Librarian, June 17, 1999

	<p>FY 1998-99: \$80,000 per zone includes appropriate processing costs selection approval of County Librarian required</p>	<p>FY 1998-99:</p> <ul style="list-style-type: none"> • \$80,000 obligation met in West and Desert zones; \$80,000 encumbered in Mid-South zone • not know if processing costs are included; however, it appears that processing costs will be included in the next book jobber contract • selection is routinely reviewed by the County Librarian <p>Additional grants and supplemental Funds: \$77,534 Business Reference Center: \$29,092 Gift funds: \$58,912</p>
<p>Reference Services</p>	<p>FY 1997-98; FY 1998-99</p> <ul style="list-style-type: none"> • Basic reference service at all branches • 2nd level reference through a Principal Reference Center (PRC) in each of the three zones • 3rd level reference referral to Inland Library System 	<p>FY 1997-98; FY 1998-99</p> <ul style="list-style-type: none"> • Paid staff at branches formerly with all-volunteer staff • Interlibrary loan unit established at Temecula with referral protocols that every branch may use • Internet service more uniformly available • Internet training for staff is being stepped up • Additional internet training for staff in next FY • Interlibrary loan unit accepts interlibrary reference • referral from PRCs • Internet access at PRCs
<p>Ancillary services</p>	<p>e.g. children's services, homework help, seniors</p>	<p>No written description or summary of data describing the complete set of ancillary services throughout the system was available for review. However, there was evidence in my site visits that many ancillary services exist, including children's services, internet training for the public, literacy, business service, to name a few.</p>

<p>Courier Service</p>	<p>FY 1997-98:</p> <ul style="list-style-type: none"> • Collecting, sorting, identifying destination and delivering items to the appropriate branch • Daily, all branches, except Sunday⁴ • PRC's, twice daily, as open • Interbranch correspondence, equipment as needed • Weekly janitorial supplies • Delivery of equipment to and from branches <p>FY 1998-99:</p> <ul style="list-style-type: none"> • Same as previous year, except weekly janitorial supplies dropped from contract • PRCs, Saturday once 	<p>FY 1997-98</p> <ul style="list-style-type: none"> • Top Priority Couriers, Inc., of Riverside, CA, was the sub-contractor, effective July 1, 1997 • The subcontract asked for the prescribed scope of service in the County contract with LSSI, that is, as noted <p>FY 1998-99</p> <ul style="list-style-type: none"> • Courier Express of Riverside, CA, is the new subcontractor, effective August 1, 1998 • The subcontract calls for the scope of service referenced in the County contract with LSSI, that is, as noted
<p>Bookmobile</p>	<ul style="list-style-type: none"> • Preventive maintenance according to manufacturer's recommended schedule 	<p>Obligations met</p>
<p>Reports</p>	<p>FY 1997-98:</p> <ul style="list-style-type: none"> • Monthly • Quarterly • Annually • Per Attachment G <p>FY 1998-99:</p> <ul style="list-style-type: none"> • Same as above, except that Attachment G delineates specific reports required by month, quarter, year • Also requires by-branch break-out of LSSI expenditures in 7 categories; county costs (total) and other expenditures (LSSI) e.g., donations 	<p>FY 1997-98 AND FY 1998-99:</p> <ul style="list-style-type: none"> • The monthly spiral bound notebook prepared by LSSI includes the prescribed categories of report data for the month and year-to-date, except for: <ul style="list-style-type: none"> • The requisite literacy data • Number, nature and action taken on complaints • Incentive awards given to staff • User suggestions (submitted through the suggestion box) • Quarterly acquisitions data is included in the monthly report, but not by Zone or branch, as prescribed • Annual per capita data was not obtainable as prescribed, except for circulation data, but this was not by zone and system, as prescribed. The contract also calls for: <ul style="list-style-type: none"> • Reference transactions per capita • Borrower registration as a percentage

⁴ except on closed days and Sunday

LSSI/RCLS EXHIBIT B

Worksheet, performance measures and standards for LSSI, 4
 R.M. Metz, Consultant, 06/23/99

		<ul style="list-style-type: none"> • Borrower registration as a percentage of population • All of the above, by zone, branch and system • By system, branch and zone data is available in RCN Item Count Report for collection turn-over rate • Consultant also reviewed the by-branch breakout of LSSI expenditures for the period July 1, 1998- March 31, 1999 in 7 categories; this did not include the county costs as stipulated in the contract
<p>Service Needs Assessment</p>	<ul style="list-style-type: none"> • Region-wide • Input on design, County officials and representatives • Performed with assistance of noted library professional 	<ul style="list-style-type: none"> • <i>Assessment Report of the Riverside County Library System</i> completed in April 1998 • Prepared by Ron Dubberly, Dubberly Associates, Atlanta, GA in collaboration with Dr. George D'Elia • Board accepted the report April 21, 1998 <ul style="list-style-type: none"> • And the recommendations of the County Librarian for improving the RCPLS based on the results of the report • And for expending the LSSI \$200,000 capital contribution
<p>Competitive Bidding for acquisitions</p>	<p>FY 1997-98: Award acquisitions contract in a competitive bid process</p>	<p>Quotes received from four jobbers, Fall 1998 through Winter 1999, with orders beginning with Baker and Taylor in June 1999.</p>
<p>Non-profit foundation</p>	<p>FY1997-98:</p> <ul style="list-style-type: none"> • Establish and operate • Governing board: County/LSSI 	<ul style="list-style-type: none"> • Foundation organizational meeting held December 10, 1998. • Mission statement and bylaws exist. • Quarterly meetings were on March 11, 1999 and June 10, 1999 • county and LSSI members of the Board of Directors have been appointed • \$20,000 raised so far • goal of raising \$100,000 in the next 12 months

<p>Community Groups</p>	<ul style="list-style-type: none"> • encouraged to participate in the branch • zone advisory committees • branch Friends groups • local donations provision in contract 	<p>Judging from anecdotal reports, community involvement with the libraries has improved during the two contract years. Monthly reports from branches make mention of Friends groups at 16 of 24 branches; the zone advisory committees meet regularly. Local donations are reportedly expended for the specified branch without adversely affecting the allocation of system funds. Zone managers comment that working actively with community groups is an implicit expectation for them, branch managers and other services staff</p>
<p>Automated Service System</p>	<p>FY 1997-98:</p> <ul style="list-style-type: none"> • Operate all facets (Attachment E) • Establish a local call dial-up line • Provide service through at least 246 terminals • Generate routine reports consistent with reporting requirements of Attachment G • upgrade the RCN by Sept. 30, 1998 <p>FY 1998-99: In addition,</p> <ul style="list-style-type: none"> • Telecom discounts reallocation proposal in event of discount • Provide service through at least 274 terminals • Conduct an audit of the RCN to determine modifications needed to better serve patrons 	<p>FY 1997-98; FY 1998-99</p> <ul style="list-style-type: none"> • All facets of the automated service system are operating • Local call dial-up exists • As of Feb 26, 1999, <i>RCN Census of Workstations</i> reports 298 networked workstations for public and staff operational or potentially operational • Routine reports are generated but not all are consistent with requirements of Attachment G • RCN upgrade proposal from vendor, DRA, received May 20, 1999; includes audit
<p>Automated System Support</p>	<p>FY 1997-98:</p> <ul style="list-style-type: none"> • College of the Desert • City of Riverside <p>FY 1998-99:</p> <ul style="list-style-type: none"> • College of the Desert • City of Riverside • City of Moreno Valley • Inland Library System 	<p>FY 1997-98:</p> <ul style="list-style-type: none"> • Support provided, delineated in separate contracts <p>FY 1998-99:</p> <ul style="list-style-type: none"> • Support provided to each jurisdiction, delineated in separate contracts

<p>LSSI investment in the system</p>	<ul style="list-style-type: none"> • \$200,000 of own funds • advanced approval of County • ongoing annual investments considered in future annual contracts 	<p>FY 1997-98: \$200,000 LSSI contribution supported RCN improvements:</p> <ul style="list-style-type: none"> • T1 link between CORNET and Data Center • 800# access to library catalog • Upgrade DRA software/network • NT server to operate GUI • 60 pcs, cables, etc • 30 barcode scanners • printers • signage
<p>Written recommended budget and service levels</p>	<ul style="list-style-type: none"> • within 60 days of April 30th written notice of budget estimate from County 	<p>County Librarian reports this has been provided and is confidential</p>
<p>Service costs not to exceed...</p>	<p>FY 1997-98:</p> <ul style="list-style-type: none"> • \$5,349,159 <p>FY 1998-99: \$4,977,476</p>	<p>Expended County funds did not exceed these amounts in either fiscal year</p>
<p>Diligent provision of services as set forth (1.1)</p>	<p>no specific measures given in contracts</p>	<p>Anecdotal comments from staff interviewed during consultants two-day site visit characterized service provision by contractor as diligent</p> <ul style="list-style-type: none"> • contractor's representatives have been highly visible at branches and in the communities • they have been very responsive to staff concerned about conditions of employment • they have acted in good faith and humanely with employees • there is a greater emphasis on customer service than pre-LSSI • innovation at the branch level is encouraged • instant rewards to staff for outstanding performance, e.g. gift certificates, a trip to Starbucks

		<ul style="list-style-type: none"> • greater flexibility is exercised in matching staff to positions suiting their interests and skills
<p>Contractor shall provide labor to perform services in a complete, skillful and professional manner (1.2)</p>	<p>no specific measures given in contracts</p>	<p>Anecdotal comments from staff, contractor's representative and County librarians interviewed during consultants site visit interpreted this performance standard as relating to the provision of MLS librarians. Most commented that the library system had as many librarians as prior to the LSSI contracts.</p> <p>Other indications that this standard is being diligently pursued:</p> <ul style="list-style-type: none"> • increased number of paid staff to operate branches on a reliable schedule • "service" teams, such as Youth Services Team, collaborating to provide a distributed program of service across the system • evidence of staff training and development becoming more systematic, e.g. zone managers' staff training needs inventory • for staff, anecdotal comments that work performance expectations are high and are reinforced and rewarded through recognition and merit pay incentives; that substandard performance is unacceptable and is forthrightly addressed by the contractor.

EXHIBIT C

Riverside County Library System

Selected Data from June 1998 Report to the State Library and LSSI Reports to the County Librarian, June 1999

	1996-97 staff FTE	1997-98	1998-99	1996-97 hrs wkly	1997-98	1998-99
West						
Gln Avon	3.9	7.85	12.0	32	40	48
Highgrove	0.4	0.9	1.3	16	16	16
MorenoVy	9.2	14.73	n/a	32	48	
Norco	1.6	3.4	2.75	30	32	32
Nuview	0.5	0.9	0.9	16	16	16
Perris	5.15	9.6	9.8	32	40	40
Robidoux	1.6	3.83	3.2	24	32	32
Literacy		2.0	2.5			
Zone		1.0	1.0			
total	22.35	44.21	33.45	182	224	184
Mid-South						
Lk Elsinor	2.75	4.05	4.1	28	28	31
Anza Sta	0	0.4	0.45	15	16	16
Calimesa	0.2	1.0	1.2	30	40	40
CanyLake	0.7	2.49	2.15	20	23	23
Idylwild	0.9	1.85	1.8	24	24	28
SanJacinto	0.9	4.47	2.0	16	20	20
Sun City	2.7	4.33	4.3	29	32	32
Temecula	10.63	14.48	12.1	32	48	48
Valle Vista	1.0	4.47	2.0	16	22	22
zone		1.0	1.0			
total	19.78	38.54	31.10	210	253	260
Desert						
Cathedral c	8.4	6.48	8.4	32	40	40
Coachella	1.3	2	2.1	28	28	28
Desert HS	0.6	2.07	2.8	16	20	28
LaQuinta	1.3	3.49	3.1	20	40	40
Lk Tameris	0.2	1	1.0	8	16	16
Indio	6.33	6.44	7.0	32	40	40
Mecca-NS	1	1	0.6	16	16	16
Palm Dese	5.73	11.5	11.6	48	48	48
1000 Palm	0.1	0.53	0.6	10	15	15
CVBKM	n/a	1.0	1.0			
Literacy		0.5	0.8			
Zone		3	2.0			
total	24.96	34.51	40.87	210	263	271
Grand totl	67.09	117.26	105.42	602	740	715
improved from 96-97		74.78%	57.13%		22.92%	18.77%

bold print denotes data reported from LSSI, June 19999

RUTH M. METZ

Ruth Metz is Deputy Director at Multnomah County Library in Portland, Oregon and a consultant in private practice. She is the former Administrator for community services (branches and youth services) at the Oakland Public Library, Oakland, CA, and the Director of the Bay Area Library and Information System in the San Francisco Bay Area. She has also been the Director of Library Development and Adult Services with the Colorado State Library and was the Director of the St. Clair County Community College in Port Huron, Michigan. She has been a librarian and library services manager for 28 years.

Ruth has designed and managed many innovative library services. Her recent work at Multnomah County Library is in readying staff for service in the digital environment, managing the new technology for public use, rethinking public services and redesigning staff and management systems for effective customer service in a digital environment.

In professional and private practice, Ruth has worked with many libraries and library systems to design and to evaluate governance, functions and operations. A graduate of the University of Michigan (AMLS, library science, AB English Language and Literature, Secondary education), She is a career-long student of, practitioner and consultant for organizational and library services development.

Ruth currently serves on the Public Library Association Committee on Resource Allocation, which has steered the development of the soon-to-be-published Public Library Association resource allocation manual. She has served on many national and state library association committees. She is an active member of the American Library Association and the Oregon Library Association.

RUTH M. METZ
Portland, Oregon
Selected Consulting Projects List

Countywide library services planning, Lane County, Oregon, 1999

Eastern Oregon Regional Library Association, 10-county Regional Library System Planning, 1998

Internet Policy, Behavior in the Library policies staff training, Alameda Free Library, 1998

Proposal writer for grant to establish a library foundation, Alameda Free Library, Alameda, CA, 1997; grant was awarded February 1998.

Facilitative developer, writer, *Public Use of the Internet and Patron Behavior* policies, Alameda Free Library, Alameda, CA, 1997

Evaluator, PORTALS Consortium, Portland, OR, 1997

Consultant facilitator, Strategic Planning Process, St. Mary's College Library, Moraga, CA, 1996.

Evaluator, senior management staff, Brooklyn Public Library, 1995

Writer/consultant for City of Alameda library building program and application for State of California Proposition 85 library construction project, 1990-91.

Consultant facilitator for the Idaho State Library to prepare statewide agenda for 1991 White House Conference on Libraries and Information Services, 1990.

Consultant and writer for a 5-year "Plan for Progress for the Alameda Free Library," Alameda, CA. 1988

REFERENCES

Peg McGowan, former Director, Alameda Free Library
1923 Melvin Road, Oakland, CA 94602
510-530-9586

Dallas Shaffer, Consultant
11071 Otallie Lane, Bainbridge Island, WA 98110-1458
206-780-8475

Steven Koblick, Ph.D.
President, Reed College, PORTALS Board of Directors
3203 S.E. Woodstock, Portland, OR 97202-8199
(503) 777-7500