LIBRARY DEPARTMENT
Open branches more hours

March 1994

Gary Blackmer
Multnomah County Auditor

MULTNOMAH COUNTY OREGON

MEMORANDUM

DATE: March 1, 1994

TO: Beverly Stein, Multnomah County Chair
         Dan Saltzman, Commissioner, District 1
         Gary Hansen, Commissioner, District 2
         Tanya Collier, Commissioner, District 3
         Sharron Kelley, Commissioner, District 4

SUBJECT: Audit of Library Department

The attached report covers our audit of the Library Department, which was included in the FY92-93 Audit Schedule. The Library Department is a new member of the Multnomah County organization and this is is the first performance audit conducted of its operations.
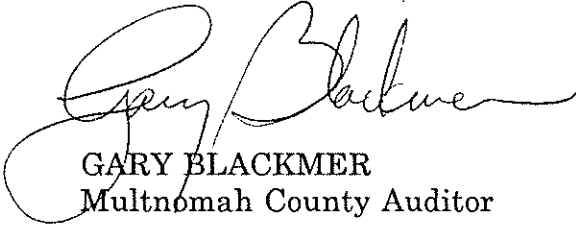
The Library Department is being compelled to rethink its direction and operations by the renovation of the Central Library, County officials, special committees and task forces, Library Department personnel, as well as this audit. Library managers shared a book with us which we would like to recommend to others who are interested in thinking about the future direction and operation of Multnomah County's library system. The book is written by the Baltimore County Public Library and is entitled *Give 'Em What They Want.* It documents the questions and solutions developed by that library system in responding to the community's needs. While Baltimore County's answers may not be appropriate to Multnomah County, most of the questions are exactly to the point.

The Library Department faces significant challenges in continuing to meet the needs of our community. As technology creates new means of accessing and presenting information, and as our information needs change, the responsibilities of library personnel and patrons will have to be continually re-examined. We know that our citizens place a high value on libraries, as evidenced by their continued support of special tax levies to pay for those services. We also know that our citizens place a high value on efficient and accountable public services. During our audit we noted many Library Department personnel who are committed to providing the best services. The fundamental challenge for them is to provide the highest quality services with the public's tax dollars.

We have reviewed these findings and recommendations with the County Chair and managers of the Library Department. Their written responses are the last section of the report.

We would appreciate receiving a written status report from the County Chair, or a designee, in six months indicating what further progress has been made regarding the recommendations identified in this report. This response should be circulated to the Commissioners.

We appreciate the assistance and cooperation provided to us by the personnel of the Library Department.

GARY BLACKMER
Multnomah County Auditor

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SUMMARY

This report covers our review of the County's libraries. In general, we found opportunities to reduce costs, increase library hours with current personnel resources, and increase productivity of library personnel. Library Department managers have already taken steps to resolve some of the audit findings. Responses to the audit are included in the back of the report.

The Library Department provides books and other materials to meet the informational, educational, cultural, and recreational needs of the residents of Multnomah County. In FY93-94 about $19.6 million is budgeted to operate the Central Library and 14 branches, as well as special programs, administration, and support services. The equivalent of about 320 personnel are assigned to the Library Department. More than half of the FY93-94 library operations are funded by a three-year serial levy. Currently, thirteen of the branches are open to the public four days a week and the Gresham Branch is open six days. The Central Library is open every day of the week.

We analyzed staffing and workload data and observed operations in the branches and Central Library. We concluded that the Library Department can reopen branch libraries five days per week with current resources. At the beginning of the audit the Library Department had noted their on-going review of staffing. During the audit, the Library modified its checkout procedures for more productive use of staff. After discussing our findings with the Library Department, management decided to increase branch operating hours and began modifying staff schedules.

We also believe that there are opportunities to manage clerical workload and modify work activities to increase staff productivity. Library managers are modifying their checkin and checkout procedures to speed the process. Beginning in March, 1994, patrons will be responsible for noting the due date on all their materials with the new Smart Check procedure. We noted that patron telephone calls decrease checkout desk productivity and recommend redirecting patron calls to informational staff. Library Department managers are investigating that method as well as automated telephone answering as another means of redirecting patron calls and reducing branch workload.

Better workspace design and signage can also improve clerical operations and improve patron access to library materials. Central Library and the branches lack adequate signage which results in more patron questions. For example, there are no clearly visible directories or signs to guide a patron through the Central Library foyer and lobby to a desired subject area. Patrons must rely upon the lobby information desk, staffed at a cost of $110,000 per year, for directions. We also observed that the location and language of current signage in the branches and Central Library could create confusion for patrons. The Library Department has a signage committee and consultant to improve the use of signage at Central Library.

The Library Department has initiated several centralized activities in recent years that have improved services and reduced costs. However, we identified several opportunities to further centralize these activities. For example, the Reference Line answers 145,000 questions from the public annually. However, patrons also directly call with questions to other informational staff in the Central Library and branches, which creates additional workload. When branch staff cannot answer a question, they direct it to a librarian and clerk in Branch Reference, separate from the Reference Line, which costs approximately $100,000 annually to operate. Directing all patron telephone and branch staff questions to the Reference Line could reduce costs and workload of staff. We also noted an opportunity to further centralize shelving activities at the Central Library which could increase the productivity of page and clerical staff as well as Reference Line staff.

Another centralized service is recruitment of volunteers who have successfully operated the Title Wave Bookstore. More needs to be done to encourage managers to use volunteers. In addition, the Library Department needs to adopt position descriptions which can improve recruiting efforts, better match volunteers to needed services, and clarify expectations between the Library Department and its volunteers.

During our audit we observed several cases of inconsistent use of the computerized fine collection and recording system. Use of the computerized system will improve controls over fines and collections.

Improvements are needed in the gathering and use of workload information. For example, staff workload information was not always consistently gathered and reported by library staff. We also noted a discrepancy generated by purchased software which tracks the number of holds placed on materials by patrons. Library managers should increase the use of gathered data in regularly reviewing the match between workload and staffing.

We recommend that the Library Department increase the number of the hours that branches are open and review its operations, signage, and workstation design to reduce clerical workload and increase productivity. We also recommend that the Library Department explore opportunities to improve and increase its use of centralized services and workload information.

INTRODUCTION

The Library became a County Department in FY90-91

The history of the Multnomah County Library Department parallels most other public libraries. The collections were usually built from private donations and, as local governments expanded their services, libraries became publically supported. Public financing of libraries was based upon strong societal beliefs that a democratic electorate needed to be educated, and that an industrial society required knowledgeable workers.

The Multnomah County Library was founded by a group of citizens as a subscription library in 1864. Members initially paid $5 for membership with $3 in quarterly dues. The Library Association of Portland was incorporated in 1875 and only began serving the general public in 1902. Beginning in 1911, the County became solely responsible for paying library operating expenses from tax revenue.

From 1911 to 1984, there was little public involvement in decisions affecting the management of the Library. In 1983, during a fiscal crisis, the County decreased financial support of the Library and services were cut. Over the next 7 years the governance of the Library was the subject of many studies and alternative recommendations. In 1984, a ballot measure proposing a change in governance was defeated by voters and, in 1987, the City of Portland did not support a proposal to create a county-wide library district.

In 1988 the Multnomah County Chair charged a Library Task Force with identifying organizations that could assume management responsibility of the Library. The Task Force recommended that the County form a separate Library Commission appointed by the County Board of Commissioners.

However, negotiations to transfer library administration to another commission were suspended by the Multnomah County Chair and in July 1990, the County assumed direct responsibility for Library operations and the Library became a County department. The County created a Library Board consisting of 15 members appointed by the County Chair, and subject to approval of the Board of County Commissioners, to serve in an advisory capacity to both the Department and the Board.

Library reliance on three-year tax levies

Library expenditures increased from $5.2 million in FY81-82 to $18.4 million in FY92-93. After adjusting for inflation, Library Department spending more than doubled (a 140% increase) from FY81-82 to FY92-93. Personnel costs are the largest category of Library Department spending, accounting for 61% of the total expenditures in FY92-93. Some of the increase in library expenditures was the result of increasing the employee work week and higher employee benefits. Exhibit 1 shows a history of serial levy revenues, library expenditures, and library spending adjusted for inflation.

Exhibit 1

Library serial levy revenues and total spending

*budgeted amounts

Source: Library financial statements and budgets

Fiscal Year	Serial Levy Revenues	Expenditures	Constant Dollar Expenditures
81-82	$20,288	$5,258,000	$7,694,511
82-83	$18,199	$5,419,000	$7,846,713
83-84	$1,513	$5,526,000	$7,785,067
84-85	$2,752,568	$7,112,000	$9,689,985
85-86	$2,848,567	$7,748,000	$10,212,574
86-87	$2,916,019	$8,163,000	$10,647,777
87-88	$7,087,852	$9,990,000	$12,605,211
88-89	$7,274,627	$11,372,000	$13,757,482
89-90	$7,368,896	$15,232,000	$17,582,480
90-91	$9,995,728	$13,888,000	$15,047,909
91-92	$8,800,285	$14,307,000	$14,862,477
92-93	$9,377,000	$18,391,000	$18,391,000
93-94*	$10,016,760	$19,564,916	$19,564,916

With the growth in spending, there has also been a shift in the sources of library revenue over the past decade. In FY82-83, the County General Fund provided approximately 90% of all Library revenues. Since that time four serial levies to support and improve library services have been approved by voters, and the reliance on serial levy revenue increased to 49% of total revenue in FY92-93. The County General Fund support of the library was reduced from $5.2 million in FY81-82 to $4.7 million in FY92-93, or a 37% decrease when adjusted for inflation..

The increasing reliance of library operations upon serial levies has resulted in a greater accountability to the voting public. Voters must regularly approve continued funding and are assured that the tax will only be used for library services. However, there is also the risk of severe service reductions if voters fail to support the levy.

Current services provided by the Library Department

The mission of the Library Department is to provide books and other materials to meet the informational, educational, cultural, and recreational needs of the residents of Multnomah County. Materials are available in many forms such as books, tapes, videotapes, compact discs, and records. The Library Department operates a larger central library in downtown Portland and 14 branch libraries situated in Portland and Gresham neighborhoods.

In Multnomah County the Central Library serves as the reference, resource, and referral center for the library system. It is also the location with the highest volume of materials checked out by patrons. Branch libraries provide popular reading for their patrons, assist in finding answers to reference questions, and also provide special programs for children. Exhibit 2 indicates the relative size and activities of the branches and Central Library.

Exhibit 2

Size, staffing, and activities of County libraries

Library	Square Footage	Hours Open Per Week	Total Staffing	Items Checked Out Annually*	Items Per Hour*
Central Library	125,000	59	117.70	2,358,138	769
Albina	3,200	25	3.58	108,474	83
Belmont	3,800	27	6.42	318,306	227
Capitol Hill	6,000	27	6.55	258,984	184
Gregory Heights	5,400	27	6.44	238,141	170
Gresham	20,000	47	15.87	749,794	307
Hillsdale	5,700	36.5	8.00	340,337	179
Holgate	6,000	27.5	7.82	304,165	213
Hollywood	7,901	36.5	10.38	420,574	222
Midland	6,850	36.5	10.56	452,589	238
N. Portland	8,047	36.5	8.56	170,089	90
Rockwood	5,800	27	6.44	212,075	151
Sellwood	2,000	25	3.51	121,388	93
St. Johns	4,082	27	6.38	249,398	178
Woodstock	5,600	27	6.38	279,990	199

*includes renewals

Source: Library Department reports

Advances in technology expanded several areas of library service. Instead of using card catalogs, patrons can use a computer terminal to search for any library material in the County. If the item is checked out, the patron may request to be notified when the material is returned, or have it delivered by mail for a fee. Automated index systems are also available to patrons to access articles in magazines and other types of information. The library has access to a computerized listing of materials owned in other library systems which greatly increases the patron's ability to request inter-library loans. The library is currently adding and exploring new informational databases available on-line and on compact disk.

The library system also targets special populations. Library Outreach Services provide library materials to those who are unable to easily access library services. The Library offers parenting centers, library tours for classes, services to day care centers, and guidance on appropriate reading materials for preschool children.

Library Department services are divided into the following areas: Community Services, Central Library, Technical Services, Support Services, Public Relations, Youth Services, Volunteer Services, and Library Administration. Community Services includes the branch libraries and outreach services. Technical Services is responsible for overseeing the selection, acquisition, and cataloguing of all new library materials and computer services. Support Services oversees purchasing, finance, budget, payroll, personnel, and delivery of materials among facilities.

Central and branch library duties

Library staff maintain the collection of materials and help the public find the materials they want. Collection maintenance includes checking items in and out, collecting fines, returning the items to the shelves, making sure items are in order on the shelves, repairing books, and searching for lost items. Library staff also assist the public in locating specific information and materials.

Library clerks and pages are directly responsible for maintaining the collection, while librarians and library assistants are responsible for answering the public's questions. Library clerks check materials in and out at the front desk. They provide clerical support, locate books for patrons, register new patrons, collect fines and fees, and answer telephones. Library pages at the branches have little direct contact with library patrons and are primarily responsible for checking in and reshelving materials that are returned to the library. Volunteers may also assist by checking in materials, reshelving items, assisting in providing children's programs or by repairing materials.

Librarians assist patrons in accessing library materials and information, and must have a Master's degree in Library Science. Among all the branches and the Central Library about 16% of the total staff are librarians. Library Department personnel use the term "professionals" to describe staff with an advanced degree in Library Science. Multnomah County also uses para-professionals, who have completed some college work but lack a degree in librarianship. Library assistants are para-professionals who can assist patrons with less difficult information needs. All branch libraries have a library assistant. At the

Central Library, library assistants are used in the Periodical, Children's, Popular and General Information sections.

There are three levels of management in the Central Library and at some branch libraries. The supervisor position, a non-professional, has immediate responsibility for supervision of clerks and pages, and does scheduling. Most employees in administrator and manager positions have a Masters degree in Library Science and are working managers.

Gresham Branch Library has a manager who supervises professional staff and a supervisor, represents the library in the community, and has responsibilities for identifying the types of items the branch will order. Four of the branches have administrators fulfilling these responsibilities. At the other 9 branches, there is no administrator or manager and the supervisor performs most of the managerial duties.

At Central Library two managers are each responsible for the larger library divisions of Humanities and Science & Business and provide direct supervision to the professionals and supervisors in these sections. Administrators at Central Library are found in the Children's, General Information, Popular, Periodical, and Circulation sections. There are an average of 11 FTE (full-time equivalent) employees for each management position at the Central Library, while at the branch libraries there are 5 FTE for each management position.

Audit scope and methodology

The purpose of this audit was to determine if library services to the public could be improved based upon current staffing and level of workload. The audit focused on the services provided directly to the public at Central Library and the 14 branches. Not included specifically in the audit were the Library's Technical, Outreach, Public Relations, Youth, Volunteer, or Support Services unless the activity related to the provision of direct public service.

We interviewed managers and staff in the Library Department, and in County Budget and Planning, Employee Services, and Risk Management. We also interviewed members of the Library Board, Friends of the Library, and the Entrepreneurial Initiatives Task Force, and attended regular meetings of the Library Board. Auditors observed operations at Central Library and all 14 branches. We interviewed managers and staff from other libraries both within the state and nationally.

In addition to interviews and observations, we reviewed professional literature on library services and management. We reviewed budget documents, organizational charts, position descriptions, reports, and planning documents. We reviewed State laws, County ordinances and administrative rules relating to library services. We reviewed audits of libraries in other jurisdictions and previous financial audit reports on the library.

We conducted a survey of other library systems and obtained comparative data on staffing and service levels. We analyzed automated management reports on workload prepared by library personnel, other routinely collected performance data, hourly reference question and telephone workload data for September and October 1993, and staffing schedules for Central Library and the branches. We reviewed the reliability of the automated data pertinent to our audit findings and comment on any weaknesses in the audit report.

This audit was conducted in accordance with generally accepted government auditing standards, except for the new requirement for periodic external quality control review. At the request of the County Auditor, audit managers from three other jurisdictions are currently reviewing the policies and procedures manual of this office for compliance with Government Auditing Standards.

During the course of our review we identified six other areas that may warrant detailed study. We recommend additional review of:

Selection and collection development. Methods for deciding the materials to be included in the libraries.

Fines, fees, and book losses. Tracking and recovery of money and materials.

Branch configuration. Location and size of library branches.

Organization of clerical, professional, and management personnel. Duties and reporting relationships.

Use of automated information systems. Managing operations and monitoring public service needs based on computerized information.

Basic and enhanced library services. Identifying the types and levels of library services provided by Multnomah County and other library systems.

AUDIT RESULTS

Library can increase hours with current resources

As a result of information in this audit the Library Department is modifying the work schedules of its personnel and modifying its clerical activities to enable it to increase its operating hours. Effective March 1, the Library Department will open thirteen of its branch libraries an extra day, add additional hours at all libraries and begin a new procedure, Smart Check, of patron noted due dates.

Branch operating hours were reduced

In the past few years, the Library Department has improved public access to its materials with community outreach programs, computerization, and the addition of youth librarians in most branches. However, accessibility has been limited by reductions in the number of hours that the branches are open to the public. A survey conducted in 1989 for the Library Department indicated that the public placed the highest importance on convenient operating hours. Total library hours of operation decreased from 630 to 492 per week, or 22%, since 1986. Library management reduced evening hours by one hour in 1991, and then cut back one full day of service later the same year. Library Department managers stated that hours were reduced in order to avoid cutbacks in other library programs, such as children's services.

Exhibit 3 shows the changes in total hours per week open during the past seven years.

Exhibit 3

History of total weekly hours open for all libraries

Source: Library Department records

Total weekly hours open

Spring 1986 Fall 1989 Spring 1990 Fall 1990 July 1991 Fall 1991 January 1992
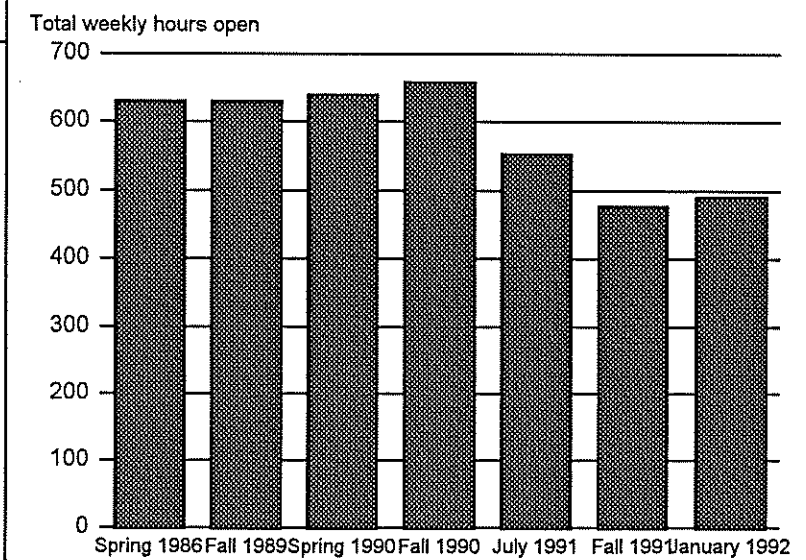
Except for Gresham, the branch libraries experienced the most significant decline in hours, with about half of the branches reducing hours by as much as 30%. All branches except Gresham are currently open only four days per week. The Gresham Branch increased its hours from 39 to 47, and began operating six days a week in 1992. While Central Library initially experienced reductions, most hours were restored in 1992, and it is now open every day of the week.

Library Department staffing has increased

The total number of Library Department personnel has increased by 15% since the Library became a County department. To determine the staffing level, we analyzed staffing from four different periods: August and December 1990, February 1992, and February 1993.

Data from these four time periods show that total library staff increased slightly from 268 FTE in August 1990 to 309 FTE in February 1993. Actual staffing at the Central Library and branch libraries increased by 23%, while other personnel in administrative, support and technical services positions decreased by 7%. For the time periods of December 1990, and February 1993, budgeted staff totaled 320 to 323 FTE. Budgeted staff is generally more than actual staff because of unfilled positions. Based upon FY93-94 projections, it will cost the County approximately $4.1 million to staff the branches to operate a total of 432.5 hours per week.

When we analyzed the staffing in more detail we found that the number of positions increased at Central and each of the branches, except at Albina and Sellwood, from 1990 to 1993. The number of positions in other library services actually decreased. The Gresham Branch Library experienced the largest increase when it opened its new facility in 1990.

Circulation of materials increased at some branches

The Library's automated checkout system allows tabulation of the number of items loaned to patrons from each branch and Central Library. In FY90-91, 5.16 million items were checked out by library patrons system-wide. (This does not include renewals.) In FY92-93, 5.22 million items were checked out, an increase of 1.0% over the two year period.

This increase, however, was not consistent across the library system. The number of items checked out dropped at Capitol Hill, Holgate, Midland, Rockwood, and Sellwood branches and at Central Library. The largest increase, 25%, was at Woodstock Branch Library. Gresham Branch Library experienced only a moderate increase from FY90-91 to FY92-93 but from FY89-90 to FY90-91, after it moved to a new facility, it increased 48%. The declines at Midland and Rockwood may be due to the new Gresham facility.
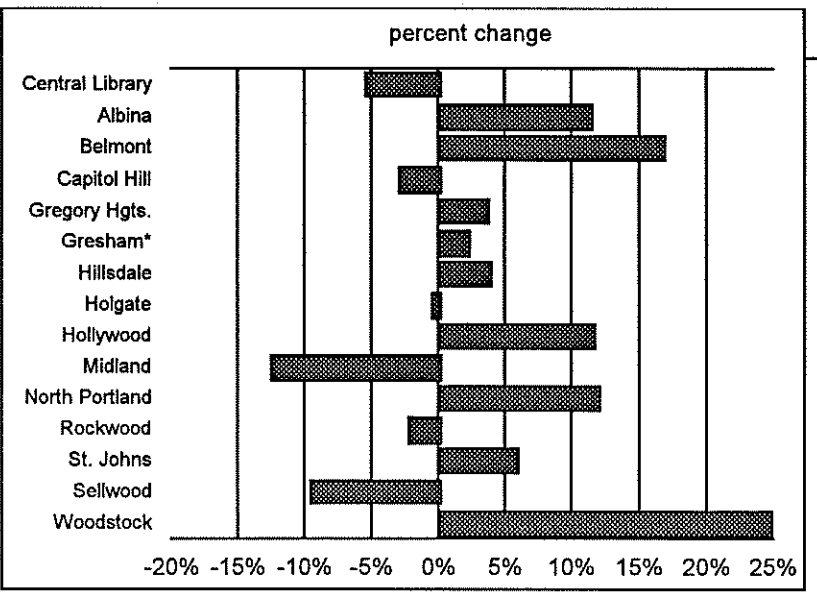
Exhibit 4 shows the percent change over the past two years in the number of items checked out at County libraries.

Exhibit 4

Percent change in
number of items checked
out, FY90-91 to FY92-93

(Excludes renewals)

*new facility in 1990

Source: Library department circulation reports

percent change

Central Library
Albina
Belmont
Capitol Hill
Gregory Hgts.
Gresham*
Hillsdale
Holgate
Hollywood
Midland
North Portland
Rockwood
St. Johns
Sellwood
Woodstock

-20% -15% -10% -5% 0% 5% 10% 15% 20% 25%

Changes in other kinds of workload

Workload data indicates that there has generally been an increase in clerical and page activities, while informational activities of the librarians and library assistants decreased. Recent innovations resulted in some of the increased workload for the clerical and page staff.

The library's card catalog was automated in 1989, allowing patrons to request material from anywhere in the library system and have it transported to the most convenient location. This greatly increased the accessibility of the library collection, and also changed the workload. In FY90-91 patrons checked out a total of 156,006 items after a "hold" was placed, compared to 293,303 items in FY92-93, an increase of 88%. Most of these materials (80%) were picked up at the branch libraries, increasing the clerical and page workload. Items placed on "hold" can be owned by the branch where the request is made, or by other branches.

Library staff must now retrieve, checkout and send the material through the Library's delivery system to the location requested by the patron. Staff at the receiving branch also must unpack and checkin the material, an additional workload. The Library Department personnel affected by this increased patron access varies. We found that the retrieval of materials, packing and unpacking of delivery items, and the checking in and out of

materials was completed by Library pages, clerks, supervisors, or volunteers depending upon the work location. Every branch, including Central Library, assigns these tasks to different job classifications.

Also in 1990, the Library Department initiated a second change in service. Library patrons were allowed to renew by telephone and a centralized telephone renewal line was created. The new telephone renewal line is staffed by 3.2 clerks. From FY90-91 to FY92-93, the number of renewals completed on the telephone renewal line went from approximately 144,000 to 871,000. At branch libraries, renewals also increased substantially from 115,000 to 376,000. This increased workload was absorbed by existing clerical staff.

Another workload shift has occurred which may be the result of reduced hours. The volume of reference transactions, where a patron has a specific informational need and requires assistance in obtaining it, decreased 2% system-wide from FY90-91 to FY92-93. Reference transactions at branch libraries decreased by 8%. This decrease was not consistent among branches. For example, Capital Hill branch library saw a decrease of 27%, while St. Johns saw a decrease of 60%. Library managers stated that some of this change may be the result of inconsistent methods of reporting.

Several of the subject libraries at Central Library also had declines in reference demand, ranging from a 1% drop in the Art & Music Library to an 11% drop in the Literature & History Library. Most notable was the decline in questions at the Information Desk on the second floor, decreasing by 25% when an Information desk was added on the first floor.

Current branch staffing is sufficient to open an extra day

We analyzed whether each branch could provide additional hours of service each week with current staff resources. We determined the number of staff hours currently available and the number of staff that would be available per hour if the branch were to open additional hours. Opening additional hours represents an 25% increase in public access to branches, and would cost approximately $1.04 million if staffing were increased an equivalent amount.

We concluded that with additional hours all branches could still have at least one informational and one clerical staff available per hour. Informational staff includes library assistant hours as well as the portion of time that youth librarians and management staff are available for informational duties. Eleven out of the thirteen branches would have over two clerical staff available per hour. The Albina and Sellwood branches would continue to have the lowest levels of informational staffing among the branches. Library Department managers state that they are currently reviewing staffing at the Albina and Sellwood

branches. Exhibit 5 shows current hourly staffing and estimated hourly staffing if the branches were open extra hours. Staffing is calculated by dividing the number of hours open by the number of staff hours available.

Comparison of branch staffing levels with current and expanded hours

Branch	Current 4-day schedule		Opening extra hours	
	Informational Staff Per Hour	Clerical Staff Per Hour	Informational Staff Per Hour	Clerical Staff Per Hour
Albina	1.28	1.87	1.05	1.53
Belmont	1.63	3.70	1.28	2.78
Capitol Hills	1.56	3.70	1.22	2.78
Gregory Heights	1.67	3.78	1.31	2.83
Gresham	2.60	4.62	1.47	2.89
Hillsdale	1.75	3.56	1.47	2.89
Holgate	1.73	3.64	1.38	2.78
Hollywood	1.97	4.38	1.64	3.56
Midland	2.44	4.40	2.02	3.57
North Portland	2.11	3.67	1.76	2.98
Rockwood	1.56	3.89	1.22	2.92
Sellwood	1.28	1.87	1.05	1.53
St. Johns	1.56	3.70	1.22	2.78
Woodstock	1.44	3.70	1.13	2.78

Source: Auditor's Office Analysis

Clerical staff can handle the workload of an additional day

While it appears that there is adequate staff to extend hours, the Library must also have sufficient staff available each hour to manage the workload. We analyzed branch workload to determine whether the library could optimize use of current staff and manage any additional workload that could occur with increased public access. We believe that there are sufficient resources in each of the branches to handle the workload. Further, there may be opportunities to better allocate staff to match the different workloads among the branches. Better utilization of staff would allow the branches to absorb any increased workload resulting from additional open hours.

Factors that can improve branch staff performance

When we reviewed staffing and workload data among the branches we found that the Woodstock branch is near the norm in workload and square footage, but appeared to be more productive with its staff than the other branches. In addition, this branch had previously been accepted as representative in a 1986 study when it was used to analyze workload and reallocate staff. We observed operations at Woodstock and conducted staff interviews. We found that the branch had a front area design and staffing plan which

allowed considerable flexibility in meeting fluctuations in the workload. Staff had also implemented a number of strategies to increase their efficiency.

Woodstock assigns primary responsibility to one clerk for both checkin and checkout duties. A second clerk is assigned as back-up to the primary clerk and is summoned only when the line of waiting patrons becomes too long. Most of the other branches assign two clerks to the front desk. At the Woodstock Branch there is frequently only one clerk at the front desk while the back-up clerk retrieves patron-requested books or performs other off-desk duties. When the back-up clerk is summoned for assistance, the line of patrons can usually be reduced in a few minutes and the clerk can then resume the off-desk duties.

In addition, the layout of the Woodstock branch front desk allows the back-up clerk to work without interruptions from patrons, but to assist with checkout when the line becomes too long. Two steps taken at Woodstock free the primary clerk to focus on checking materials in and out: the information desk is placed at a prominent location to draw patrons with questions, and every attempt is made by all staff to relieve the front desk of telephone responsibilities.

Capacity in other branches to handle more work

When we analyzed hourly transactions at the branches we found significant fluctuations by hour of the day. At the Woodstock branch desk we observed that, on an average, the primary clerk could handle a maximum of 286 items per hour. When we compared this measure to the work performed at other branches we found blocks of time when one clerk at the desk would be sufficient, rather than the two which are specifically assigned.

All the branches, except Albina and Sellwood, assign at least two clerks to the front desk, using a total of 860 clerical hours each week. If the other branches were able to operate at the levels achieved by the Woodstock branch, only 735 clerical hours would be required, freeing 127 hours a week of clerical time, or the equivalent of 3 clerks, to perform other duties. At the Gresham Branch two back-up clerks may be necessary because of the higher volume of workload which occurs there.

We also considered the impact of additional hours on services other than the checkin and check out function. These services can be just as critical to library operations. Also, to reduce the risk of on-the-job injuries from activities that require repetitive movements, clerical staff need some time away from the front desk where these types of injuries are more likely to occur.

Currently, 52% of total clerk hours are assigned to desk responsibilities. We estimate that opening an additional day in each branch library, excluding Central Library, would increase desk time to 64% of a clerk's day. However, there would still be periods of low demand to also perform off-desk activities.

Current informational staff can handle the workload of an additional day
Services provided at libraries are not just the checking in and out of materials. Patrons also need assistance in finding materials and answering specific informational questions. At branch libraries, the library assistant position and a percentage of the management and youth librarian's hours are dedicated to this type of assistance. Most of the branches always have one of these informational staff scheduled to assist patrons. The Gresham and Midland branches, because of their size, often have more than one informational staff person assigned, while the Sellwood and Albina branches occasionally operate without informational staff.

The quantity of patron questions varies by hour and among the branches and Central Library. The average number of informational questions per hour in FY92-93 at branch libraries was 11, ranging from 5 per hour at Sellwood to 24 at Gresham. The hourly average number of questions at Central Library per subject area was 16, ranging from 9 questions per hour at the Documents and Children's sections to 34 in the Periodical Library.

Library Department managers stated that a minimum of one informational staff person should be available to respond to patron requests. When we analyzed the availability of informational staff at each branch we made adjustments for other responsibilities such as supervision, community outreach, book selection, and children's programs. Applying the standard of one informational staff per hour, except for Midland and Gresham branches, which staff two information desks hourly, we found that, on the average, branches have an additional 19 hours of informational staffing available per week. Although the excess informational staffing is not spread evenly among the branches, ranging from 4 additional hours at Albina branch to 41 at North Portland branch, increasing open hours appears feasible, particularly if staff can be reallocated.

Although the hourly number of questions is higher at Central Library, the number of questions per FTE is slightly higher at the branches. Informational staff at branches answered 13,700 questions per FTE in FY92-93 while Central Library staff answered 12,100 questions per FTE. While the skills required to answer questions at Central Library may be more specific, the volume is representative of the workload.

Allocation of staff among library system could be improved

We reviewed the allocation of clerical staff among the branches. The current allocation of staff is based on the number of hours each branch is open. While branches with similar hours may have had similar workloads in the past, the data no longer supports this assumption. For example, both North Portland and Hillsdale branch libraries are open 36.5 hours weekly and both are allocated 3.25 clerical FTE. However, twice as many items are checked out per hour at Hillsdale than at North Portland.

This uneven allocation of staff resources has a cost. At the Hillsdale branch personnel cost per item checked out is $1.06, compared to North Portland which costs $2.45 per item. A staffing allocation system that is related to the workload would allow the library to reduce costs at certain branches and use staff more efficiently at all branches.

When we applied the performance levels achieved by the Woodstock branch to the workload of the other branches we found that clerical hours at the front desk could be reduced in 10 of the 14 branches. North Portland could almost reduce its clerical staff by one full-time position, representing almost one-third of its current clerical staffing. In other branches the clerical hours could be reduced or used to absorb any increased workload resulting from additional hours of operation.

There may also be opportunities to better allocate clerical staff between the Central Library and the branches. Because of the different types of clerical functions at the Central Library, comparing costs to branches is difficult. However, it appears that at some branches clerical personnel are handling a higher number of items than staff at the Central Library. Based upon FY92-93 data, the maximum number of items handled on the average at the checkout counters at Central Library was 236. Branch clerical personnel, however, handled as high as 374 items per hour on the average. Branch clerical personnel are also responsible for telephones and patron queries, which compounds the difference.

The branch page position should be directly linked to the workload. Library pages do not directly serve the public and are not generally responsible for activities that must be performed during open hours. However, we found that allocation of pages is generally related to the number of open hours at each branch. As a result, the number of items checked out per page varies significantly across branches. Belmont and Woodstock branches circulate over 100 items for each hour of page staffing, while Albina, Sellwood, and Rockwood branches handle from 60 to 70 items.

There may also be opportunities to allocate informational staff at the Central Library to better match the workload. A library study in 1992 determined that librarians in the Science & Business and Humanities divisions spend about 3.5 to 4 hours each day providing information to patrons. The library, however, has not developed position descriptions that indicate what the allocation of time should be to particular activities.

Informational staff allocation is not proportionate to the quantity of questions received. Informational staff at the Children's section are 13.8% of total FTE but the questions received in FY92-93 represented only 6.7% of total. The Art & Music section received 8.5% of the total questions but were allocated 13.1% of the total staffing. The Periodicals section staffing is imbalanced in the opposite direction. That subject area is allocated 15.9% of FTE but had 26.2% of the workload in FY92-93.

The Library Department managers state that the lack of agreement in the informational workload and informational staffing is due to additional duties assigned to some sections. They also state that it often requires less effort to answer questions in some sections, such as Periodicals.

Opportunities to better manage the workload

During the course of this audit the Library Department initiated the Smart Check program which will speed checkout procedures and increase staff productivity. Managers are also investigating modifications to their telephone systems to reduce workload on branch clerks. In addition, we identified other methods of managing and organizing library activities to meet a growing workload.

Work activities can be simplified and better organized

Checking in and checking out materials requires several physical movements on the part of clerical staff. While we conducted this audit, clerks were required to open books, lift the book to scan the barcode, stamp the due date, and close the book. The checkin process required all of the same movements except the date was crossed off rather than stamped.

Without a decrease in service quality, the quantity of movements can be reduced by some simple adjustments. Barcodes could be placed on the outside of materials and date stamping eliminated. Other library systems are successfully using patron self checkout procedures. In December 1993, the library began to place barcodes on the outside of all newly purchased materials. Date stamping will be eliminated with implementation of Smart Check, patron noted due dates, on March 1, 1994.

The layout of some branch front desks also hinders materials handling. Branch security systems and facility size seemed to limit work flow improvements, but there is still a considerable amount of flexibility available. In the branches which separate checkin and checkout functions, productivity was reduced when the checkin clerk assisted with checkouts. The location of the security system required that the checkin clerk leave the work station, get each patron's materials, and return to the work station to complete ccheckoutout. This lack of efficient design resulted in additional workload and time in completing tasks. A survey of the current array of work space designs at the branches would allow the library to determine the best location of workstations and security devices.

The disruption to branch work flow caused by patron calls can be easily reduced or alleviated. At some of the branches, informational and other clerical staff answered calls when checkout staff was busy. At other branches, informational staff did not assist clerks. We observed that many of the answered calls required informational staff assistance. As a result, the clerk would have to call informational staff to the phone or, on some occasions, would leave the front desk in search of staff to answer the call.

There are other options that can be pursued. At the Gresham Branch, which has a telephone at the information desk, staff at that desk answer over 80% of the incoming calls. At Woodstock and Hollywood branches, staff alleviate from 20% to 40% of calls at the front desk by answering the telephone in the back workroom. Library Department managers state that they are currently investigating an automated attendant system which they estimate will reroute about 60% of the calls.

Need to encourage patron independence

Library Department personnel pride themselves on their patron-oriented attitudes, and we observed many instances of helpful and courteous behavior to the public. However, signage in libraries is also a well recognized method of guiding the public to their individual interests, and can be accomplished at a lower cost than paying for staff time.

Good signage allows patrons to find their way in a complex environment. It should present information in a consistent manner to avoid confusion, and should include directions, identification of key library areas, and informative instructions on how to access library materials. The Central Library and the branches have not adequately utilized signage and other design cues that allow patrons to access the facilities to the maximum extent possible without staff assistance.

For example, we toured the Central Library to determine the effectiveness of current signage. We found that patrons entering the foyer and lobby areas cannot see a directory of the library, signage to guide the patron to an area of interest, or brochures that provide an overview of the library collection and how to access it. Library maps and directories can only be found in a corner of the main lobby area next to the elevator. A brochure with maps and locations of materials could only be found on the third floor.

For patrons who are unfamiliar with the library, the only means of orienting themselves is to ask for assistance at the information desk in the lobby. As a result, about 70% of the questions answered at this desk are directional. Elimination of the desk and introduction of adequate signage could save approximately $110,000 annually. Since creation of the lobby information desk, the number of questions received at the second floor Information Desk have dropped 20%. Library managers stated that they have reduced staffing at the second floor Information Desk. The second floor Information Desk could resume answering the other patron questions.

Some of the current signage in the library is ineffective because of confusing terminology. For example, in the Periodical section at Central Library there are no cues on how to locate magazines. A card catalog which lists the library's holdings is not identified. A large sign on columns in front of magazine shelving states, "Reference Periodicals." Patrons may be confused by the unfamiliar terminology and the lack of arrows to indicate the location of the area. Once in the shelves, there is no signage to assist the patron in finding earlier magazine issues.

Accessing the periodical collection is very difficult without repeated assistance from library staff. In fact, more than 25% of all library questions in FY92-93 were received in this department. If effective signage could achieve a 20% reduction in questions, at least one position could be shifted to another part of the library system or eliminated, resulting in a savings of approximately $40,000 annually.

Branch libraries could also improve signage. In some branches, lack of signage, the arrangement of the front desk and the information desk, and unclear terminology discourages or misdirects patrons seeking information. We saw some information desks with visible signage, however, they were labeled "reference" which may not be a meaningful term to some patrons. Other desks were labeled "?" or "Information," but were not centrally located or easy to find. Lacking a clear cue of where to direct questions, patrons would approach the front desk with questions, resulting in additional workload for the clerical staff.

Maximize use of centralized library services

The Library Department centralized several activities which provide better service at lower costs, but it could better utilize their potential. The telephone Reference Line has been in existence for 20 years and answers 146,000 questions annually. Of the calls received, 90% can be answered by library assistants at the Reference Line and the other 10% are referred to informational staff in the subject areas at the Central Library.

Other Library programs and staff also provide telephone reference services, and there may be opportunities to centralize more of these activities. In addition to the Reference Line, we found that staff at branches and the Central Library also directly receive and answer patron telephone requests for information.

The need to answer the more complex reference questions at branch libraries resulted in creation of the Branch Reference service, which assists branch informational staff who are unable to answer patron questions. When branch library personnel cannot answer a patron's question, they FAX the question to Branch Reference, located at Central Library. The librarian determines the answer and sends a FAX reply to the branch. Branch Reference is staffed with one librarian and one clerk FTE, and service costs about $100,000 annually.

There may be opportunities to consolidate informational services and improve access of branch patrons reducing the need for informational staff at branch libraries. Branch staff could answer only the easier and more common questions, while more complex questions could be referred to a centralized service. This could allow patron access to the full Central Library resources and produce cost savings at branches by assigning informational staff only during high demand hours. When information staff is not available at the branches, patrons could be directed to access the Reference Line service.

Stack Services is also a centralized service in the Central Library which could be better utilized. Stack Services personnel retrieve items from the closed stacks for patrons, put returned items in classification order on book carts for shelving, and reshelve materials. However, Stack Services only operates in the closed stacks and in three of the seven subject areas, Business & Science, Literature & History, and Government Documents, at the Central Library. For three of the other subject areas, Art & Music, Periodicals and Popular Library, pages are directly assigned and complete tasks only for that particular section. For the Children's Library, Stack Services staff put items in order, but Children's Library staff reshelve them. Less fragmented shelving activities could allow for more effective adjustment of staff as workload changes.

Consolidated shelving activities could also increase the productivity of staff assigned to the Reference Line. When a patron requests a particular item that can be checked out, the Reference Line staff determine its availability, retrieve the item, if it is located on the second floor, while the patron remains on the telephone, and take it to the first floor for patron pick-up. For materials shelved in the stacks, or on the first or third floors, pages retrieve the item and deliver it to the first floor for patron pick-up. Assigning Stack Services responsibility for retrieval and delivery of all requested materials could result in a greater capacity for the Reference Line to provide service. Library managers state that calling the patron back about a requested item is less efficient. Reference Line staff also wait until several books have stacked up before they are taken to the first floor.

The Library Department created a centralized telephone line which handled a substantial increase in telephone renewals from 144,100 in FY90-91 to 871,000 in FY92-93. Intended to serve all County patrons, this centralized service has never been fully utilized. Patrons continue to telephone their branches to renew items. As a result, branch libraries also experienced a substantial increase in this workload from 115,000 telephone renewals in FY90-91 to 376,000 in FY92-93. Some of this increase may be caused by renewals at the branch when the patron renews without the item physically in hand. However, new branch staffing was not allocated to handle the increased telephone workload. If patrons were encouraged to better utilize this service, either through increased publicity or an automated attendant telephone system, branch clerical workload would be reduced. Library managers are currently investigating the use of an automated attendant telephone system.

Increase use of volunteer services

The Library Department's volunteer program very successfully provided complete staffing for the Title Wave Bookstore which had a gross income of $109,000 in FY92-93. However, the volunteer program is not fully utilized in other parts of the Library Department. Implementation of volunteer services lacks the coordination and the organization in the branches and Central Library that succeeded in the Bookstore.

While volunteer recruitment is centralized in the library, all other elements of the program are fragmented. Library managers are allowed discretion in determining how many volunteers will be used and for what types of positions. The volunteer coordinator for the Library does not have standard position descriptions and relies on the needs identified by the managers. As a result, volunteers are found in the library system performing a wide range of services. Some branches have volunteers checking in returned items at very critical times. Other branches will not use volunteers for checkin because they feel the work

is too complex for volunteers to master or that the union would object. Volunteers instead are used to provide services that are peripheral to library functions.

We contacted County Labor Relations and reviewed the current collective bargaining agreement to determine whether the Library was prevented from more fully utilizing the work of volunteers. The current County agreement allows the use of volunteers unless County employees are adversely affected, such as layoffs. As long as volunteer activities do not result in library personnel layoffs, the Library Department could increase the use of volunteer efforts.

During our survey of other libraries we found examples of more structured approaches to volunteer management. A volunteer coordinator at the Austin Library stated that position descriptions are the key to a good volunteer program. Clear job descriptions help to market the program and recruit volunteers, successfully match volunteers with positions, and add to the clarity of expectations between the library and its volunteers. The Austin Library made the page position one that is routinely filled by volunteers. It also successfully linked the library to the corrections system and has a very strong program for persons completing community service as part of their judicial sentence. The coordinator stated that community service volunteers were committed to completing volunteer hours by a certain time period which assisted library managers in scheduling. Library Department managers stated that they also use community service volunteers.

Ensure uniform fine collection practices
While the library has a policy regarding fine and fee collection, it has not been implemented uniformly. The computerized system calculates fines as part of the checkin process. Some personnel utilize a different checkin procedure to by-pass the fine assessment. Several times we observed clerks mentally calculate the fine total and deposit the patron's fine in the cash box without recording the transaction on the computer. Other times the transaction was bypassed to "forgive" the fine, once when the patron didn't even request it. Consistent use of this policy will increase accuracy, uniformity in patron treatment, cash accountability, and revenues.

Improve reliability of management information
Good management requires reliable information for tracking and analysis of operations. During the course of this audit we found three areas in which the library could improve the use and reliability of management information. The library's current manual collection method of statistics allows routine error. Some performance indicators reported from the automated system are not understood, either by the library's automated system staff or the

software company. Finally, the library could use data that is routinely prepared to better monitor activities and improve management.

Currently, branch front desks maintain a daily tally of the number of questions and telephone calls received. Methods for collecting and compiling statistics varies. Some desks use a mechanical device for counting and record only a daily total. Other desks manually place tally marks on a calendar by the hour and sum the count at the end of the day. Some desks or libraries maintain a computerized record, while others keep a written record. Each of these methods require different amounts of time to complete. Collecting the minimal amount of data necessary, in the most efficient and uniform manner across branches would result in time savings and increased staff productivity.

We obtained original copies of the data collection forms and reviewed the collection and analysis methods. As the raw data was entered into computer software for analysis, errors in addition and the totaling of tally marks by library staff were regularly noted. While the errors for the most part had minimal effect, there were some that created fairly substantial differences.

During another part of our analysis, there was a wide discrepancy noted between reports generated by the administration and the reports submitted to the Central Library Director. After checking with the administration staff, it was determined that all departments were not consistently submitting reports to the administrative office. Library procedures have been changed to ensure timely submission of reports and to improve the accuracy of information.

As we developed workload measures for the library, we were unable to determine the source of one of the critical indicators needed; the routing of items between libraries to fulfill "holds" placed by patrons. This indicator would have documented a major change in the library workload, the number of items retrieved and routed among branches and Central Library as a result of patron requests. Both library personnel and the software vendor were unable to determine exactly what transactions were counted to generate a standard report on "Intra-Library Loans" or explain why there was a wide discrepancy between the number of items reported checked out and belonging to another branch and the number of holds placed. Through our analysis, we were also able to determine that one transaction that the vendor and library staff thought was not being counted was, in actuality, part of the numbers being reported.

Although some questions of accuracy need to be resolved, the library still routinely gathers statistics that can be very useful for operational analysis. One good example is the "Branch Analysis Spreadsheet" prepared by the administrative office. Although this information was gathered and reported, it could be better used to analyze branch operations. Increased use of information currently gathered could allow library managers to monitor and make adjustments for discrepancies between staffing and workload.

RECOMMENDATIONS

As noted in the audit report, the Library Department has already addressed, or initiated actions to address, many of the audit recommendations listed below.

A. To increase public access to branch libraries, the Library Department should modify the schedules of personnel so that the branches can be opened an additional day each week.

B. To better manage the workload and increase branch library staff productivity, the Library Department should:
    1. Investigate opportunities to balance the workload among clerical and other positions. Some possible areas to consider include:
        a. Assign telephone responsibilities to librarians or library assistants;
        b. Use automated telephone call screening to assist in directing patron calls to specialized services such as the Reference Line or the Renewal Line.
    2. Investigate opportunities to modify workstations and procedures for checking in and checking out materials.

C. To encourage library patron independence, reduce staff workload, and reduce costs, the Library Department should evaluate the Central Library and each branch for opportunities to improve signage, visual cues, and other methods for directing patrons to the information or service they need. Consider removing the information desk in the Central Library lobby.

D. To reduce costs and better utilize Library Department centralized services, the Library Department should:
    1. Consider assigning Reference Line staff the responsibility for responding to branch information requests and eliminate the Branch Reference service.
    2. Explore the use of the Reference Line by branch patrons instead of scheduling informational staff during periods of low patron use.
    3. Consider transferring first and third floor pages to Stack Services and assigning Stack Services the responsibility of retrieving materials requested by patrons through the Reference Line.

E. To reduce the cost of Library Department services, increase citizen involvement in library activities, and effectively use volunteers, the Library Department should:
   1. Encourage managers to explore new opportunities to use volunteers.
   2. Develop position descriptions for volunteer activities that assist library personnel.

F. To improve the accuracy of fine collections, increase accountability, and increase revenues, the Library Department should ensure that staff appropriately use the computerized system to record all fine transactions.

G. To ensure the best match between staffing and workload, the Library Department should:
   1. Develop consistent data collection and reporting methods for the various library programs and branches.
   2. Investigate discrepancies in statistics reported by the purchased software program.
   3. Use gathered information to regularly review patterns or trends in workload, and the match of staffing to workload.

RESPONSES TO THE AUDIT

Beverly Stein, Multnomah County Chair

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(503) 248-3308

February 25, 1994

Gary Blackmer
Multnomah County Auditor
1021 SW 4th, Room 136
Portland, Oregon 97204

Dear Gary,

I would like to thank you and your staff for your excellent work on the program audit of the Library Department. I'm once again reminded of the value of having an outside look at our operations.

I agree with you that library hours are a key issue with many citizens and I am very pleased that through the joint efforts of your office and the library we have developed a plan to expand services without additional cost. The Library Director believes that the risk of restoring hours without additional staffing is a reasonable one. I applaud her for her willingness to take that risk.

The temporary move of the Central Library during construction, the efforts of the Long Range Planning Committee, and the implementation of our quality initiative at the county (The RESULTS campaign) will provide us with excellent opportunities to evaluate and use your recommendations.

During the budget process this spring, I will examine and make recommendations concerning branch information referral services.

I will ask the Library Planning Committee, chaired by Paul Bragdon, to make recommendations on branch configuration, use of appropriate technology for information systems, and basic and enhanced library services.

The Library Director is reviewing information services at the Central Library and how the remodeled library can best accommodate information needs. She is also reviewing signage throughout the system, centralization of stack services, staffing at branches libraries, and current automation opportunities.

Expansion of the library's already extensive volunteer program will be furthered by your recommendations.

Thank you again for a quality product that will help stimulate discussions of library issues for months to come.

Sincerely,

Beverly Stein

February 24, 1994

Gary Blackmer, Auditor
Multnomah County Auditor's Office
1021 SW 4th Room 136
Portland, OR 97204

Dear Gary,

Multnomah County Library is pleased to have this opportunity to respond to the audit of the Library Department recently completed by you and your staff. And we are especially pleased at the improvement in library service for residents of Multnomah County that will be a direct result of following the recommendations of the audit. The major improvement in service will result from the additional open hours at branch libraries. As of March 1, all branches will be open at least five days each week, and all will open earlier on Friday and Saturday. Library branches will be open a total of 110 additional hours each week.

As this audit shows, there is a significant benefit to review of library operations by someone who approaches library issues without the library bias that can come with experience in operating libraries. The auditors had the time and opportunity to do an analysis of library operation that would be impossible for library staff to duplicate. This response to the audit discusses especially the items highlighted in the audit summary and recommendations. For information about action contemplated as a result of details in the body of the report, please contact library staff directly.

Library staff responded to all of the questions and requests for information on the part of the auditors, and had the opportunity to discuss the direction of the audit at several points in the process. Your and your staff asked for our suggestions for areas to review, and I am pleased that these formed a good portion of what they chose to study.

Library staff had been reviewing the possibility of opening additional hours for some time - almost since the time the hours had been reduced. Of particular concern to us was the problem of using effectively full-time, five-day-a-week employees in branches open only four days a week. Many branch staff are part-time,

but most of the supervisors, children's librarians, and some other staff are full-time. Opening the additional day will solve this problem, and extend much-needed service to our community.

Library staff have been working for nearly a year on planning for **Smart Check**, a major change in the way books and other library materials are circulated to the public. This change, which will affect approximately 14 million transactions each year, will require the library user to note for themselves the date books are due back to the library. In addition, books will be processed and labeled differently, and handled differently by library staff when books are checked in and out. We had anticipated that in time this and other efficiencies would allow us to open additional hours. The primary recommendation of the audit led us to the decision to open those additional hours at the same time **Smart Check** is implemented - March 1.

Early discussion of the audit report led to a survey of the reasons for phone calls to branch libraries. We found that about 35% of the calls were inquires about hours for that specific location. About 22% of the calls are with questions about overdues, renewals, fines or questions about library cards. About 20% of the calls are for information, with this service more heavily requested by callers to Gresham Regional Library. As a result of this survey, and the recommendation of the audit, telephone automated answering systems will be installed at all branches. These automated systems will give the hours of that specific location and allow for direct transfer of those who call branches to centralized services like Renewal Line and Reference Line. This should reduce by more than half the number of calls that need to be answered by branch library staff.

The audit recommends that branch library staff refer library users' questions to Reference Line, instead of Branch Reference Service. Branch staff do call Reference Line when library users have questions that can be answered by this ready reference service. Adding telephone equipment that will allow direct access to Reference Line by those who call branches for information will further increase use of this centralized service. Questions referred by branch staff to Branch Reference Service are more complicated that those that can be answered by Reference Line. Branch Reference Service is designed to provide access to the resources of Central Library to users of branch libraries. While this has value, providing this service may not be as high a priority as other library services. It is likely that Branch Reference Service will not be included in the library's budget request.

An information desk was located on the first floor of Central Library two years ago in order to give library users a logical and immediate place to ask for directions and help. Library users had complained about the complexity of the building, and library staff had observed that the directory previously located at the entrance did not provide what people needed. The first floor information desk has provided an opportunity for people to get information on how to use the library. Many of those who ask questions are new to Central Library. Cost of staffing this desk with library assistants is nearly equal to the reduction in cost for librarians because fewer

questions were asked at the second floor desk. In December, the Central Library will be relocated to a temporary location. The final plans for the renovation of Central Library may result in other solutions to this problem.

The audit makes a number of other recommendations that are being implemented. We are reviewing the compilation and use of management information, and reviewing the procedures and training for collecting and recording fines. Signage at branches and at Central is being reviewed and can surely be improved. This continues a sign review project begun some time ago. New signs for the periodical department of Central Library have been installed since this audit report was begun, for example.

Centralized supervision of page staff at Central is underway, as is page retrieval of books in response to questions to Reference Line. Both of these changes have been made easier by addition of capacity for electronic communication among Central Library staff.

Volunteers are already an essential part of library operations. We use more volunteers than most libraries our size. The recommendations of the audit report, and the clarification in recent contracts with the bargaining unit, will help to increase the use of volunteers in all areas of the library.

A number of other areas in the audit report will result in continued study by library staff and have the potential to modify library operations further. Examples include clerical staffing patterns at branches, workload measurements in addition to reference questions at Central Library, and design and location of the circulation desks at branch libraries. The opportunities presented by the review by the County Auditor of the library will continue to bear results for library staff and for Multnomah County residents. We are pleased to have had the opportunity to be audited!

Sincerely,

Ginnie Cooper
Director of Libraries

GC:rg

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