



Oregon

Kate Brown, Governor



State Library
of Oregon

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January 29, 2021

To: Joint Ways and Means Subcommittee on General Government

From: State Library of Oregon

Re: Requested Reference Materials for Budget Presentation

State Library of Oregon Budget Reference Materials

AGENCY MISSION AND GOALS

VISION: Equitable access to library and information services for all Oregonians.

MISSION: The State Library of Oregon cultivates, preserves, and delivers library and information services to foster lifelong learning and community engagement.

VALUES

- **Equity:** We challenge our personal and organizational biases in order to improve our practices and better serve all communities.
- **Access:** We commit to ensuring information is preserved, discoverable, and available.
- **Collaboration:** We invest in sustained and intentional partnerships by sharing expertise and resources to achieve mutual goals.
- **Public Service:** We deliver excellent customer service and stewardship of resources to support democracy and the public good.
- **Future Readiness:** We anticipate and respond to evolving trends and needs of all Oregonians.

State Library Strategic Plan 2020 – 2023

Full strategic plan is available on State Library web site at:

<https://www.oregon.gov/library/operations/Pages/Mission-Values.aspx>

STRATEGIC FOCUS AREA 1: DELIVER RESPONSIVE PROGRAMS AND SERVICES

Goals

- Oregonians pursue learning that contributes to their personal well-being and the well-being of their community.

The State Library of Oregon cultivates, preserves, and delivers library and information services to foster lifelong learning and community engagement.

- Oregonians are connected to state government and Oregon’s heritage through digital initiatives and preservation strategies.
- Stakeholders’ interests and needs are reflected in relevant and effective programs and services.

Objectives

- Equip Oregon library staff to respond to changing demographics and to the community needs of early learners (children 0-5 years old).
- Grow workforce development efforts to enhance the contribution local libraries can make to economic and community well-being.
- Increase access to local-interest books available to print disabled individuals.
- Enhance preservation and access to physical and digital library and heritage collections.
- Improve user experience with State Library services to retain and grow the user base.

STRATEGIC FOCUS AREA 2: ENHANCE STRATEGIC PARTNERSHIPS AND ENGAGEMENT

Goals

- State employees and the public receive seamless information and research services through partnerships and collaborations with state agencies.
- Oregon communities receive more robust services when libraries collaborate with agencies and organizations around mutual interests.

Objectives

- Maximize the use of library and information resources and reduce duplication between agencies.
- Develop partnerships that leverage existing infrastructure and shared expertise to improve service delivery.

STRATEGIC FOCUS AREA 3: GENERATE AWARENESS OF AND SUPPORT FOR OREGON LIBRARIES

Goals

- Stakeholders understand and appreciate the impact of State Library programs and services on individuals and communities.
- Oregonians understand and appreciate the value and impact libraries throughout Oregon have on individuals and communities.

Objectives

- Increase awareness of and engagement with the State Library.
- Make data and tools available to library staff across Oregon to effectively communicate the positive impact of libraries on community well-being.

STRATEGIC FOCUS AREA 4: BUILD AGENCY INFRASTRUCTURE AND CAPACITY

Goals

- Staff are empowered to deliver quality services and programs through updated technology tools and professional development opportunities.
- Staff integrate anti-racism, equity, diversity, and inclusion principles into daily work, decision-making, and programs and services.

Objectives

- Modernize critical library systems to increase reliability, effectiveness, and sustainability into the future.
- Enhance staff knowledge and skills to ensure successful strategic plan implementation and personal development.
- Increase employee anti-racism, equity, diversity, and inclusion competencies.
- Increase access to State Library services for populations that are being, or have historically been, underserved or marginalized.

HOW THE REQUESTED BUDGET WILL ACHIEVE DESIRED PROGRAM RESULT

The Governor's budget will allow the State Library to continue to provide excellent service to our various stakeholders, and work towards our strategic plan goals. Although there are reductions included in the Governor's Budget, through careful and conservative management of the budget, the State Library would be able to absorb these reductions without significant impacts to programs and services.

OVERVIEW OF AGENCY PERFORMANCE AND OUTCOME MEASURES

The State Library worked with the State Library Board to assess the agency key performance measures (KPMs) in 2020 and has proposed changes to the agency KPMs that are more reflective of the work we do and measure our effectiveness in more meaningful ways.

The proposed changes are below:

1. **Current: Research Transactions** - Number of research assistance transactions for state employees.

Revise to:

- **Patron Service Transactions** – Number of reference queries, document delivery and interlibrary loan requests, and outreach/instruction sessions to state agency employees.
- **Current Target:** 9,000
- **New Target:** 8,000

2. **Current: Use of Government Services Electronic Resources** - Average [daily] use of Government Information and Library Services electronic resources.

Revise to:

- **State Agency Employee Use of Electronic Resources** – Total yearly use of Government Information and Library Services electronic resources.

This includes 3 different measures:

- Total yearly searches: A SEARCH is a point of entry into a library database
- Total yearly actions: ACTION is the process of navigating throughout a database
- Total yearly downloads: DOWNLOAD is the successful conclusion of locating the needed information for the research.

Targets

- Searches: 140,000
- Actions: 90,000
- Downloads: 55,000

3. **Current: Talking Book and Braille Services Users** - Number of individuals registered to receive Talking Book and Braille Services.

Revise to:

- **Talking Book and Braille Library Average Use by User** – Total number of circulations per year divided by the number of registered users at the end of the fiscal year.
- **Target:** 70 books/user

4. **Current: Cost Per Circulation** - Cost per circulation of talking books and Braille books.

Delete and replace with:

- **Value of Talking Book and Braille Library** – Percent of Talking Book users that strongly agree or agree that the Talking Book and Braille Library has added value to their life.
- **Target:** 80%

5. **Current: Use of The Oregon School Library Information System** - Average daily visits to the Library-funded Oregon School Library Information System.

Delete and replace with:

- **Value of Library Support Programs and Services** – Percent of Oregon library staff that strongly agree or agree that the services and programs offered by Library Support help them provide better library service to their community.
- **Target:** 70%

6. **Current: Public Libraries Meeting Applicable OLA Standards** - Percentage of Oregon public libraries meeting essential and enhanced level of applicable Oregon Library Association Standards for a Public Library.

Delete and replace with:

- **Ready to Read Participation** – Total annual participation of youth 0 – 14 years of age in a Ready to Read grant funded activity.
- **Target:** 330,000

7. **Customer Satisfaction** – Percent of customers rating their satisfaction with the agency’s customer service as “good” or “excellent”: overall, timeliness, accuracy, helpfulness, expertise, availability of information.
- **Current Target: 98%**
 - **New Target: 90%**

The 2020 Annual Performance Report is attached.

SUMMARY OF PROGRAMS

Library Support and Development Services Division

The Library Support and Development Services Division provides consultation services, professional development, statewide library services, and grants to 1,700 public, academic, school, and tribal libraries across the state.

The division administers state-funded Ready to Read grants to public libraries in Oregon to support summer reading and early literacy programs. The Ready to Read grant program is supported by state General Fund dollars. It is available to all legally established public libraries to provide early literacy and summer reading programs to local communities. All 134 eligible libraries received Ready to Read grants in 2019. 252,397 children were served by library early literacy programs and 211,368 children participated in summer reading programs.

In addition, the division administers federal [Library Services and Technology Act \(LSTA\)](#) grant funding received through the Institute of Museum and Library Services (IMLS) as competitive grants and for statewide library services including the [Answerland online reference service](#), the [Oregon School Library Information System \(OSLIS\)](#), and the [Statewide Database Licensing Program](#). Oregon's LSTA allotment for Federal Fiscal Year (FFY) 2020 is \$2,401,036.

Federal LSTA funds received from IMLS require maintenance of effort (MOE) and a match on the part of states. The State Library must contribute 34 percent of the total LSTA program funding per year from non-Federal resources. The non-Federal “match” may include contributions from a State, from local sources, or from other non-Federal entities, including, corporations and foundations. The MOE requires the state to maintain its financial support for library programs and services at not less than the average amount reported for the previous 3 years. General funds in the Library Support Division, general funds in the Talking Book Division, and the Talking Book Division donation funds count toward the MOE. If the State Library fails to meet the MOE, the law requires that the allotment be reduced by the same percentage by which the State Library failed to meet the MOE requirement.

In addition to the [\\$394,924 awarded in LSTA competitive grants](#) in FFY 2020, the State Library provided two grant opportunities to local libraries in response to the COVID-19 pandemic:

COVID-19 Response Mini-Grants

COVID-19 response mini-grants supported Oregon libraries in responding to immediate needs in their local communities brought about by the COVID-19 pandemic. The State Library re-allocated LSTA funds from other projects and programs for this purpose. Libraries were invited to apply for grants of \$500, \$1,500 or \$3,000. The grant funds were used to meet a wide variety of needs related to COVID-19 response. Examples include continuing education for staff, digital services such as e-books and online

resources, and costs associated with providing storytime and other library programs remotely. A total of 101 grants were distributed for a total of \$240,000 with 58% of the grants going to school libraries, 32% to public libraries, 9% to academic libraries, and 1% to tribal libraries.

CARES Act Grants

The IMLS received \$50 million through the CARES Act and distributed \$30 million to State Libraries and territories based on population. The State Library of Oregon was allocated \$381,108. IMLS provided the following direction on how this CARES Act funding is to be used:

- a. Primarily to address digital inclusion and related technical support, using the following types of data to inform targeted efforts:
 - Poverty/Supplemental Nutrition Assistance Program (SNAP)
 - Unemployment
 - Broadband availability
- b. Secondly to address other efforts that prevent, prepare for, and respond to COVID-19;
- c. With respect to (a) or (b), reach museum and tribal partners, in addition to traditionally eligible library entities, where appropriate.

The State Library applied the IMLS suggested criteria to Oregon counties and offered grants to the nine federally recognized tribes, and to all public libraries and community college libraries in the highest need counties (Baker, Coos, Crook, Curry, Douglas, Harney, Jackson, Jefferson, Josephine, Klamath, Lake, Lincoln, Malheur, and Union). Each library was allocated a \$2,000 minimum grant, and the remainder was allocated based on service population. Additional details including the grant amount per library are available on the State Library's [CARES Act web page](#).

COVID-19 Support

In addition to grant funding, the Library Support and Development Services division provided COVID-19 information and resources to local libraries including:

- [COVID-19 Resource Guide](#)
- [Statewide COVID-19 Advice for Library Sector](#)
- Consulted OHA to provide [library materials handling advice](#)
- Regular check-ins for local library staff and [Topic Talks webinars](#)

Talking Book and Braille Library

The Talking Book and Braille Library serves Oregonians with print disabilities by providing Braille materials, audiobooks, descriptive videos, and magazines through the mail and digital download. This is a free service to eligible Oregonians, with over 5,000 active users and an average of approximately 30,000 items circulated every month. The Talking Book and Braille Library is the regional library in Oregon for the Library of Congress' National Library Service for the Blind and Print Disabled (NLS) network. For the fiscal year ending June 30, 2020, there were 5,004 Oregonians registered for the service and the average use per registered user was 69 items per year.

The Talking Book and Braille Library implemented Duplication on Demand in 2020, which increased title availability, eliminated wait time for popular titles, and increased the number of titles a patron can have a one time. Duplication on Demand is a system that allows talking book libraries to create customized digital cartridges containing titles requested by patrons from the entire NLS collection of more than 90,000 titles. This change greatly enhanced customer service and streamlined operations. Patrons had been receiving books in a traditional way—one title per cartridge. Now every patron gets up to 8 titles on a single cartridge with a maximum of five cartridges at a time. Additionally, this method eliminates wait time for specific books because all titles are held electronically and eligible to borrow simultaneously. With simultaneous lending possible, the six-week loan period has been eliminated and there is no need to manage overdue materials. In addition to the benefits to patrons, the time spent by staff checking in and checking out materials each day has been reduced from eight hours to two hours.

Government Information and Library Services Division

The Government Information and Library Services Division provides library services to state officials and state employees to assist them in their work including research assistance, professional development, and instruction. The division preserves state and federal agency publications and other Oregon-related materials and makes them accessible through the library's [online catalog](#), [Oregon Digital Collections website](#), and interlibrary loan services. The State Library provides dozens of [online databases](#) to state employees to support their research needs. In the fiscal year ending June 30, 2020, the total number of research assistance transactions was 7,907.

The Division also serves Oregonians with access to the circulating collection, as well as permanent public access to federal and state of Oregon publications. The State Library building is open to the public 8:00 to 5:00, with staffing available to assist the public with the collection and questions 1:00 to 4:00 pm each weekday. Due to the COVID-19 pandemic, however, the State Library building has been closed since March 2020. We continue to provide assistance to the public by phone and email. State Library [digital collections](#) are freely available to the public 24/7.

By statute, the State Library is required to collect state publications, and has been doing so since the early 20th century. In 2009 the library created an [online repository for digital agency publications](#). In 2016, a new digital asset management system moved forward efforts to modernize the collection and availability of electronic agency publications as they are published. The State Library is systematically digitizing older items from the Oregon Documents Collection, prioritizing unique or rare items. Digitizing efforts make these publications available worldwide and protect fragile items from damage through physical use.

- As of December 31, 2020, there are 120,884 Oregon state government publications in Digital Collections and 830 videos in Digital Collections.
- From January 1, 2020 through December 31, 2020 14,273 Oregon documents added to the Oregon Documents collection, with 13,891 of those added to Digital Collections.
- COVID-19 has significantly impacted the workload related to the Oregon Documents collection. In 2020, the State Library added 4,107 COVID-19 related agency publications in 39 languages to the Oregon Documents collection.

Through the embedded librarian program, each state agency is assigned a librarian to provide specialized assistance and resources to support state agency staff in their work. Librarians become familiar with the work of their assigned agencies and connect with them to conduct presentations, training on resources, and provide research support.

Between 01/01/2019 through 06/30/2020, embedded librarians conducted 66 presentations or participated in events with their embedded agencies engaging with a total of 1,249 state employees. Agencies with active embedded librarian programs include:

- Department of Agriculture, Department of Environmental Quality, Department of Human Services (Vocational Rehabilitation, Lean Academy Self-Sufficiency), Oregon Advocacy Commissions Office, Department of Transportation, Department of Fish and Wildlife, Oregon Youth Authority, Oregon Health Authority (Office of Equity & Inclusion, State Hospital), Employment Department, Department of Administrative Services, Higher Education Coordinating Commission, Department of Consumer and Business Services, Oregon Bureau of Labor & Industries, Department of Corrections, Commission for the Blind, Department of Energy, Department of Revenue, PERS, Oregon Real Estate Agency, Health Related Licensing Boards, and Oregon Patient Safety Commission.

In addition to the embedded librarian presentations, during this same period librarians held 92 classes for state employees with a total of 898 participants.

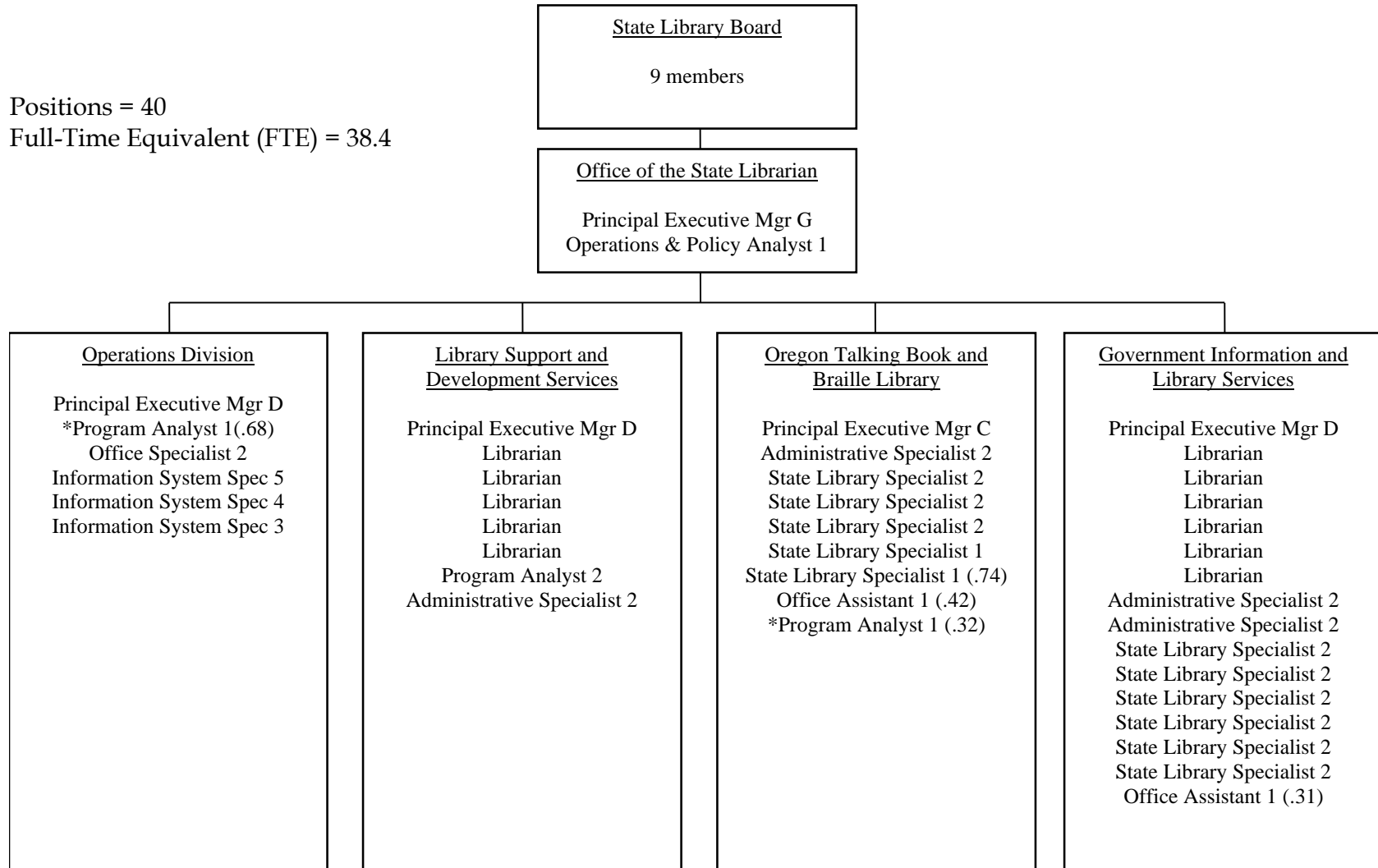
Operations Division

The Operations Division provides services and support to State Library staff members and volunteers. The division manages the agency finances and provides information and support to other divisions in managing budgets and purchasing. The division provides information technology support for the agency and supports staff in troubleshooting issues, purchasing and installing equipment, and identifying and implementing technology solutions. The division recruits, trains, and supports volunteers in providing service throughout the agency. The State Library has a nine-member policy board that is supported by this division including meeting scheduling, minute-taking, travel coordination, and board packet preparation. The State Library building has meeting rooms that are available to state employees and the public, and the Operations Division coordinates the scheduling and support of these rooms. Agency communications are produced and coordinated by the Operations Division.

AGENCY ORGANIZATIONAL CHART AND DESCRIPTION OF HOW SERVICES ARE DELIVERED

State Library of Oregon Organization Chart

Positions = 40
 Full-Time Equivalent (FTE) = 38.4



* This position is split between two programs.

Service Delivery

Typically, the State Library building is open to the public from 8:00 a.m. to 5:00 p.m., with staffing available to assist the public with the collection and questions 1:00 to 4:00 p.m. each weekday. Due to the COVID-19 pandemic, however, the State Library building has been closed since March 2020. The State Library continues to provide assistance to the public by phone and email. State Library [digital collections](#) are freely available to the public 24/7.

State Library services are delivered in the following ways:

- Customer service is provided via telephone, email, and chat messaging.
- Document delivery and electronic resources reach the desktop of state agency employees.
- Staff work with libraries, boards, and agency staff throughout the state through virtual meetings and will resume in person meetings when it is safe to do so.
- Our electronic resources are accessible 24/7:
 - [State Library Catalog](#)
 - [Digital Collections](#)
 - [Research databases](#) for state employees and the legislature
 - [Databases](#) available to all Oregonians
 - [Answerland](#) 24/7 chat reference service

MAJOR BUDGET DRIVERS

- New and updated technology to support remote work and modernize library systems.
- Reductions of local library budgets with increased library usage and greater reliance on State Library support through grants and consulting.
- Sophisticated information needs of state agency staff requires materials and services to meet those needs.

MAJOR CHANGES TO THE AGENCY IN THE PAST 6 YEARS

2019-21

- New State Librarian hired in May 2019.
- Management restructure implemented in 2020.
- New three-year strategic plan adopted by State Library Board in 2020.

2017-19

- Leadership transition with Interim State Librarian in place.
- Accountant position was eliminated. The State Library partners with Department of Administrative Services Shared Financial Services for accounting, payroll, and budget assistance.

2015-17

- House Bill 3523 (2015)

- Increased State Library Board from seven to nine members. Mix of library and state agency representatives.
- State Librarian is appointed and serves at the pleasure of the Governor, subject to confirmation by the Senate.
- State Library certification of state agency libraries.
- Approval of agency purchases of research database subscriptions.

COST CUTTING MEASURES

- Critical evaluation of electronic resources to reduce duplication, measure usage, and reduce costs. Reduced the electronic resources budget by 10% in the 2017-19 biennium.
- Take advantage of free or low-cost virtual training for professional development.
- Meeting and providing instruction in the virtual environment.
- Assessed landline needs and deleted lines that are no longer necessary.
- Will be assessing collection space needs, which may result in reduced rent costs in coming years.

BUDGET INFORMATION: REVENUES AND PROGRAM BUDGETS

State Library Revenues

Other Funds

Donations: Donations are received from individuals in varying amounts as well as from various non-profit and enterprise foundations and businesses. Grants are occasionally available on a competitive basis for special projects to benefit all Oregon library users or specific groups of users. Donations are for specified projects and may not be expended for any other purpose. Donation fund estimates are based on historical data and adjusted for anticipated trends.

Projected donations and interest income for the 2021-23 biennium is \$318,000.

Miscellaneous receipts: Miscellaneous income is from rental of conference rooms and from charges for lost materials. Additional minor receipts are from proceeds of sales of surplus property. These miscellaneous receipts may be used for any budgeted programmatic expenditure. Miscellaneous receipts income estimates are based on historical data and adjusted for anticipated trends.

Projected miscellaneous receipts income for the 2021-23 biennium is \$22,950.

State agency assessment: The State Library biennially assesses state agencies for services provided, one-third based on agency use and two-thirds on FTE (full time equivalent) count.

The Department of Administrative Services provides a listing of state agencies and their FTE staff count. This information is used to calculate the two-thirds portion of the assessment based on FTE.

Agency usage of the State Library is calculated from recorded transactions collected during the 2017-2019 biennium. Transactions are weighted for the various types of activities or services. State Library staff have determined the weighting factors, based on estimates of the relative labor, systems support, resource materials, and processing steps required for the delivery of individual types of transactions, focusing on the staff time and effort cost for delivering the respective services.

The following weighting factors were used to develop the 2021-23 biennium assessment:

Weight Factors for Assessment Computations

ITEM	Effort/Cost Index	Calculation Basis
Patron Services: Reference and consulting	5	Per contact, 0-5 min.
	30	Per contact, 6-30 min.
	60	Per contact, 31-60 min.
	90	Per contact, >60 min.
Interlibrary loan, Document delivery (all formats)	45	Per item
Government Information and Library Services patron registration	5	Per individual registration
Instruction and Outreach: number of patrons from each agency, per session	60	Per participant

- **Patron Services** - State Library staff record and compile statistics on all reference and consulting transactions as they occur. The transactions are individually recorded by state agency and computed by the index/scale in the table above. The statistics are totaled and reported monthly, quarterly, and annually.
- **Interlibrary Loan/Document Delivery** - Transactions are recorded for each item processed and submitted in the monthly, quarterly, and annual statistics.
- **Government Information and Library Services patron registration** - Registrations are recorded as they occur and compiled for annual statistical reporting.
- **Instruction/Outreach** - The number of patrons from each agency are counted for each instructional session and the usage calculation is based on average class/presentation time of 60 (minutes).

Assessments to state agencies for library services are projected to be \$7,114,162 for the 2021-2023 biennium.

Federal Funds

The State Library administers various federal Library Services and Technology Act (LSTA) grants to local libraries through a competitive application process and utilizes LSTA funds to support statewide programs and resources. The State Library monitors federal legislative actions to project anticipated funding levels.

Under the state maintenance of effort requirements of the Library Services and Technology Act (LSTA), states must maintain the average of expenditures in the past three years in state-funded programs relevant to the priorities of LSTA. Any reduction in state funding results in an identical percentage reduction in funding under the LSTA.

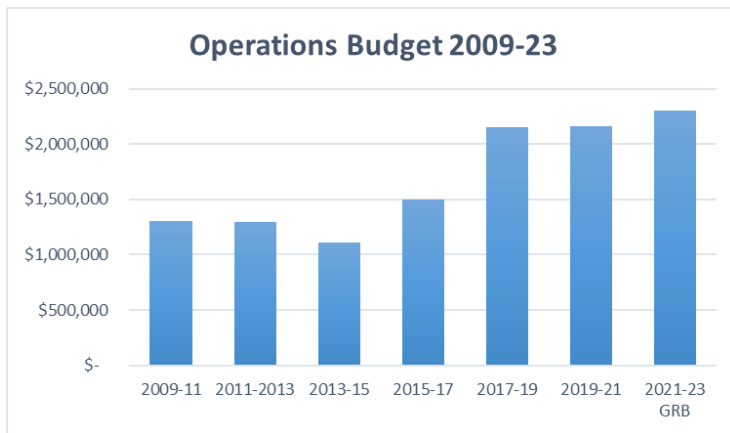
The Library Services and Technology Act (LSTA) funding is expected to increase annually at approximately 2.5% per year as follows:

- FFY2020 \$2,401,036
- FFY2021 \$2,461,062
- FFY2022 \$2,522,588

Projected LSTA income for the 2021-23 biennium is \$5,000,000.

Program Budget Information

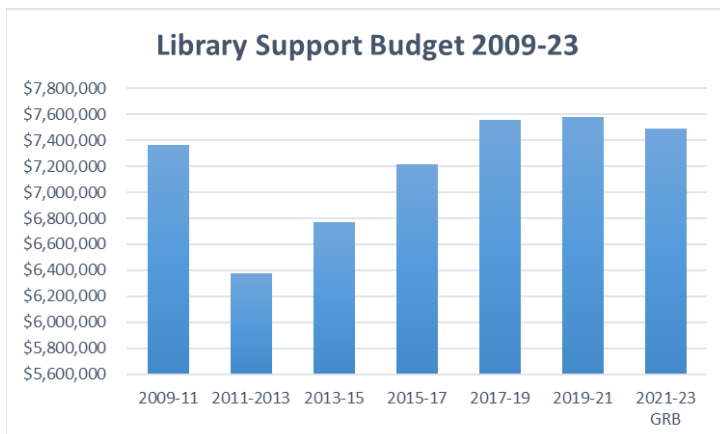
OPERATIONS DIVISION



Governor's Budget

General Funds	\$ 102,860
Other Funds	\$2,028,667
Federal Funds	<u>\$ 168,081</u>
Total	\$2,299,608

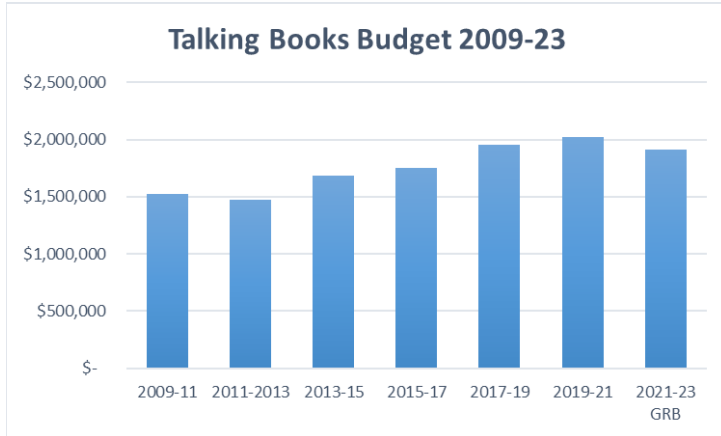
LIBRARY SUPPORT AND DEVELOPMENT SERVICES DIVISION



Governor's Budget

General Funds	\$2,625,701
Other Funds	\$ 65,725
Federal Funds	<u>\$4,798,113</u>
Total	\$7,489,539

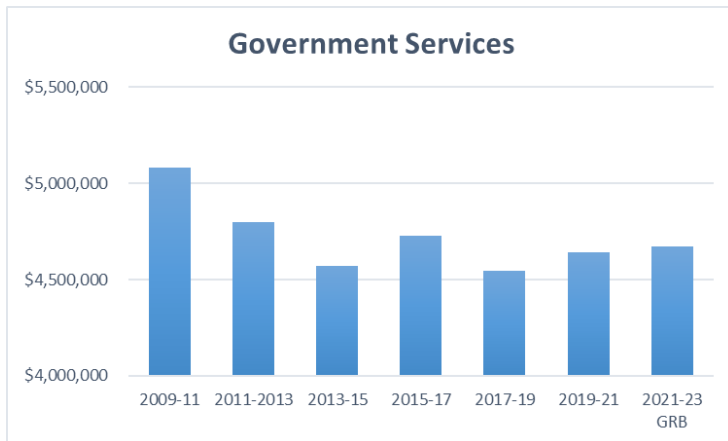
TALKING BOOK AND BRAILLE LIBRARY



Governor's Budget

General Funds	\$1,589,391
Other Funds	<u>\$ 320,931</u>
Total	\$1,910,322

GOVERNMENT INFORMATION AND LIBRARY SERVICES DIVISION



Governor's Budget

Other Funds \$4,671,860

Total **\$4,671,860**

PROGRAMS THAT ARE SHARED WITH OR DEPENDENT ON OTHER AGENCIES

N/A

SUMMARY OF PROPOSED LEGISLATION AFFECTING AGENCY OPERATIONS

N/A

REDUCTIONS INCLUDED IN THE GOVERNOR'S BUDGET, 10% REDUCTION OPTIONS REQUESTED BY LFO, AND INFORMATION ON VACANT POSITIONS

Governor's Budget Reductions

- Operations Division Other Services & Supplies \$23,517
- Talking Books Professional Services \$41,033
- Hold Talking Books SLS1 Position Vacant 1 year \$46,621
- Eliminate Part-Time Vacant Office Assistant 1 Position \$39,721
- Inflation reductions on some Services and Supplies accounts \$76,994
- Increase vacancy savings to five percent of Personal Services \$147,783

There are reductions in the Governor's budget including reductions to the other services and supplies budget, professional services budget, elimination of inflation in some services and supplies accounts, and an increase of vacancy savings to 5% of personal services. Although these reductions will reduce the agency's flexibility in responding to unanticipated supplies and professional service needs, the State Library can absorb these reductions without impact to our services.

The Governor's budget includes elimination of a vacant part-time position in the Government Information and Library Services Division. These tasks have been assigned to other staff and we don't anticipate significant impact to our operations. In addition, the Governor's budget holds a position vacant in the Talking Book and Braille Library for the first year of the biennium. Talking Book operations have been streamlined with the implementation of a new service model called duplication on demand, and we will use this time to determine our staffing needs.

10% Budget Reduction Options

General Fund

- Operations Division Other Services & Supplies \$23,517
- Talking Books Professional Services \$41,033
- Hold Talking Books SLS1 Position Vacant \$93,385

• Hold General Fund portion of OPA1 Position Vacant	\$18,443
• Reduce Ready to Read Grant Funding	<u>\$277,067</u>
Total	\$453,445

The State Library prioritized preserving Ready to Read grant funding as much as possible when developing the 10% reduction options for the General Fund. Ready to Read funding is the only state funding for local public libraries and supports libraries in providing early literacy and summer reading programming for youth.

Since Ready to Read funding accounts for over 30% of the State Library’s general fund budget, there aren’t many reduction options without impacting programs and staffing. The reductions listed are those that would have the least impact on programs and service delivery.

Other Fund - Assessment

• Eliminate Vacant Part-Time Office Assistant 1 Position	\$39,721
• Cancel select e-resources subscriptions	\$30,035
• Reduce Government Services Travel, Professional Services, Office Supplies, and Other Services & Supplies budgets	\$30,036
• Hold Acquisitions and Serials Specialist (SLS2) position vacant	\$180,555
• Hold ISS4 position vacant	\$161,556
• Hold OPA1 position vacant	\$123,793
• Eliminate Outreach and Technical Services (SLS2) position	<u>\$141,175</u>
Total	\$706,871

Reductions to the other fund assessment would result in impacts to staffing and programs. The Government Information and Library Services Division is funded 100% through these funds, and reductions would impact the division’s ability to provide service state employees and the legislature. The first three proposed reductions could be absorbed with less impact:

- Elimination of the vacant part-time office assistant 1 position can be absorbed without significant impact by reassigning duties to other positions.
- In the 2017-19 biennium, the State Library proactively reduced the e-resources budget by 10% after carefully analyzing usage. Further reductions would impact the services we provide state agency employees, limiting direct and timely access to relevant resources. This may result in increased interlibrary loan costs as we would need to pay to access articles we don’t have through interlibrary loan.
- A reduction to Government Services travel, professional services, and office supplies budgets would limit opportunities for staff professional development and training and will reduce capacity for responding to services and supply needs.

The remaining reductions would create more significant impact to services and operations:

- Holding the Acquisitions and Serials Specialist position vacant would impact the processing of serials and cataloging collections causing delays in providing access to library resources.

- The ISS4 position is one of three IT positions at the State Library. With this limited staffing, the agency can manage day-to-day operations, but would be unable to adequately move the agency technology-related initiatives forward in a timely manner.
- The vacant OPA1 communications and operations analyst position is part of a recently approved permanent finance plan. This position is responsible for the development and coordination of agency communications and processes as well as administrative support in areas such as research, data collection and tracking, and report writing. It is critical for the implementation of the agency strategic plan goals and initiatives under the strategic focus area to generate awareness of and support for Oregon libraries.
- Eliminating the Outreach and Technical Services (SLS2) position would impact cataloging and digitizing collections causing delays in providing access to library resources. This position is currently filled, so this would result in the layoff of an employee.

Vacant Positions

The State Library is a small and lean agency. The State Library carefully assesses each vacancy to determine whether the position is still needed and if so, whether the position description should be modified to best meet agency needs. When the pandemic hit and it was clear that the state would be facing budget challenges, the State Library began holding positions vacant pending finalization of the 2021-23 biennium budget.

The following positions are currently vacant:

Talking Books Division

- Talking Books SLS1 Position (included in 10% budget reduction options; held vacant for 1 year in Governor's budget)

Government Services Division

- Government Services Part-Time Office Assistant 1 Position (eliminated in Governor's budget)
- Government Services Acquisitions and Serials Specialist (SLS2) (included in 10% budget reduction options)
- Government Services Systems Librarian

Operations Division

- OPA1 Position (included in 10% budget reduction options)
- ISS4 position (included in 10% budget reduction options)

AGENCY'S GOVERNOR'S BUDGET

The agency Governor's Budget document is available on the State Library web site at:

<https://www.oregon.gov/library/Documents/State%20Library%2021-23%20Governor%27s%20Budget.pdf>

**RESULTS OF ALL AUDITS ON THE AGENCY CONDUCTED BY THE SECRETARY OF STATE
UNDER ORS 297.070 DURING THE CURRENT BIENNIUM**

N/A

**SUPERVISORY SPAN OF CONTROL REPORT FOR AGENCIES WITH MORE THAN 100
EMPLOYEES**

N/A

SUMMARY OF PROPOSED TECHNOLOGY AND CAPITAL CONSTRUCTION PROJECTS

N/A

Program Prioritization for 2021-23

Agency Name: State Library of Oregon																					
2021-23 Biennium																			Agency Number: 54300		
Program/Division Priorities for 2021-23 Biennium																					
1	2	3	4	5	6	7	8	10	12	14	15	16	17	18	19	20	21	22			
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program-Activity Code	GF	OF	FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL included in Agency Request				
Agcy	Prgm/Div																				
1	SLO	Library Support and Development Services	This program provides leadership, grants, and consulting assistance to approximately 1,600 public, school, academic and tribal libraries. The Ready to Read Grant program enhances public library services to children. The Library Services and Technology Act grant program uses federal funds to extend services to all Oregonians and encourage library innovation.	KPM 5, 6, 7	7	3,931,135	71,916	4,828,555	\$ 8,831,606	8	8.00	Y	Y	FO	Library Services and Technology Act 20 U.S.C. 9101	Must meet Federal Match requirements (34%). Must meet MOE requirements (GF funding related to 5 year plan equal to average of past three years). Federal funds must be spent on the Oregon Five Year Plan activities which are based on the LSTA Purposes.	Package 101: This package increases Ready to Ready grant funding distributed to Oregon public libraries, raising the minimum grant from \$1,000 to \$2,000 and the amount per child from approximately \$1 to \$2 per child. This additional funding would be distributed directly to public libraries to support enhanced summer reading and early literacy programs.				
2	SLO	Government Information and Library Services	This program provides information and research services to state employees in all branches of state government. Information is provided in-person, by phone or email, or by using the State Library's website that contains a wealth of databases and other information resources. The division provides permanent access to state government publications and acquisitions, catalogs, and circulates library materials.	KPM 1, 2, 7	4		4,936,743		\$ 4,936,743	16	15.31	N	Y	S	ORS 357						
3	SLO	Talking Book and Braille Library	This program serves Oregonians with print disabilities by providing Braille, audiobooks, descriptive videos, and magazines through the mail and digital download. This is a free service to eligible Oregonians, with over 5,000 active users and an average of approximately 30,000 items circulated every month.	KPM 3, 4, 7	7	1,900,538	326,293		\$ 2,226,831	8	7.48	N	Y	FO	US Code, Sec. 135a	Provide services and products from Library of Congress, National Library Services for the Blind and Print Disabled (NLS) program to all residents in the state that meet the NLS eligibility criteria. Services must be provided at no cost to such residents. Conduct all activities in accordance with NLS policies and procedures and Association of Specialized and Cooperative Library Agencies Standards.					
N/A	SLO	Library Operations	This program is responsible for administrative functions and program support including strategic leadership, fiscal management, information technology, volunteer coordination, communications, and State Library Board support. The Operations Division provides the infrastructure support and services necessary for the other State Library divisions to successfully carryout their programs and services.	KPM 7	N/A	128,176	2,131,969	171,445	\$ 2,431,590	8	7.68	N	Y								
						5,959,849	7,466,921	5,000,000	\$ 18,426,770	40	38.47										

Document criteria used to prioritize activities:

- 1. How many Oregonians does the program serve?
- 2. Does the program provide a good return on investment?
- 3. Would the program be valued by a majority of Oregon citizens?
- 4. Is there clear evidence that the program provides good results?

Within each Program/Division area, prioritize each Budget Program Unit (Activities) by detail budget level in ORBITS

7. Primary Purpose Program/Activity Exists

- 1 Civil Justice
- 2 Community Development
- 3 Consumer Protection
- 4 Administrative Function
- 5 Criminal Justice
- 6 Economic Development
- 7 Education & Skill Development
- 8 Emergency Services
- 9 Environmental Protection
- 10 Public Health
- 11 Recreation, Heritage, or Cultural
- 12 Social Support

19. Legal Requirement Code

- C Constitutional
- D Debt Service
- FM Federal - Mandatory
- FO Federal - Optional (once you choose to participate, certain requirements exist)
- S Statutory

Library, Oregon State

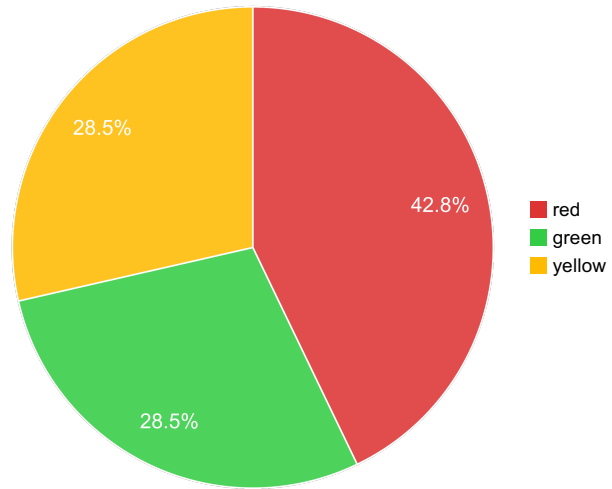
Annual Performance Progress Report

Reporting Year 2020

Published: 9/25/2020 3:08:58 PM

KPM #	Approved Key Performance Measures (KPMs)
1	RESEARCH TRANSACTIONS - Number of research assistance transactions for state employees.
2	USE OF GOVERNMENT SERVICES ELECTRONIC RESOURCES - Average [daily] use of Government Information and Library Services electronic resources.
3	TALKING BOOK AND BRAILLE SERVICES USERS - Number of individuals registered to receive Talking Book and Braille Services.
4	COST PER CIRCULATION - Cost per circulation of talking books and Braille books.
5	USE OF THE OREGON SCHOOL LIBRARY INFORMATION SYSTEM - Average daily visits to the Library-funded Oregon School Library Information System.
6	PUBLIC LIBRARIES MEETING APPLICABLE OLA STANDARDS - Percentage of Oregon public libraries meeting essential and enhanced level of applicable Oregon Library Association Standards for a Public Library.
7	CUSTOMER SATISFACTION - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.

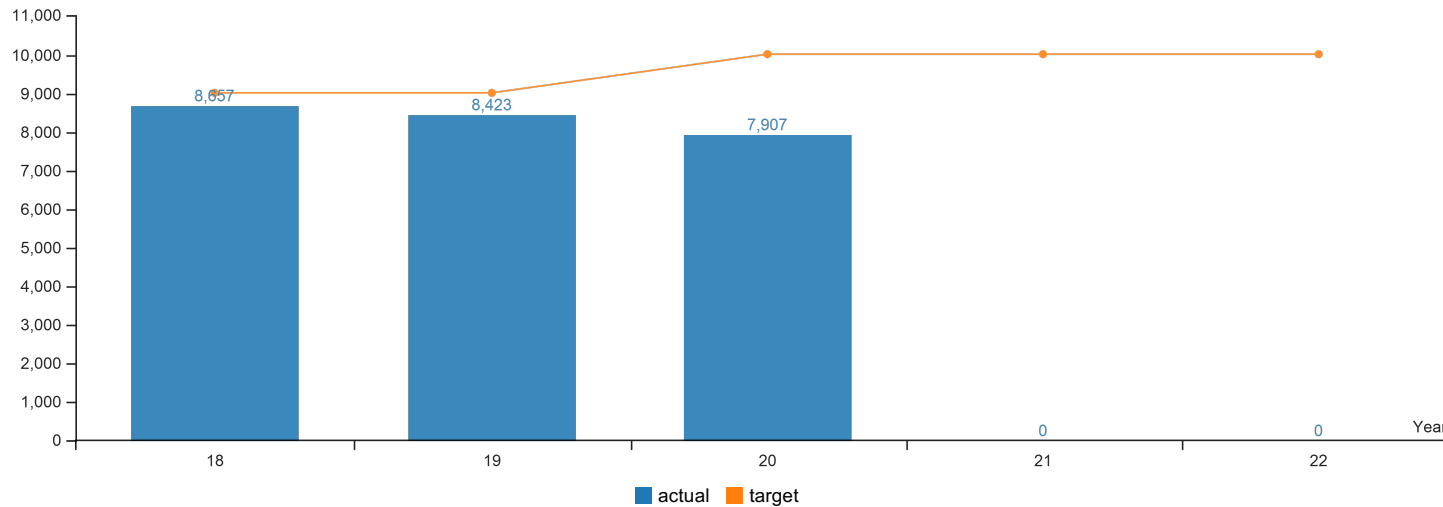
Proposal	Proposed Key Performance Measures (KPMs)
Delete	RESEARCH TRANSACTIONS - Number of research assistance transactions for state employees.
New	Patron Service Transactions - Number of reference queries, document delivery and interlibrary loan requests, and outreach/instruction sessions to state agency employees.
Delete	USE OF GOVERNMENT SERVICES ELECTRONIC RESOURCES - Average [daily] use of Government Information and Library Services electronic resources.
New	State Agency Employee Use of Electronic Resources - Total yearly use of Government Information and Library Services electronic resources.
Delete	TALKING BOOK AND BRAILLE SERVICES USERS - Number of individuals registered to receive Talking Book and Braille Services.
New	Talking Book and Braille Library Average Use by User - Total number of circulations per year divided by the number of registered users at the end of the fiscal year.
Delete	COST PER CIRCULATION - Cost per circulation of talking books and Braille books.
New	Value of Talking Book and Braille Library - Percent of Talking Book users that strongly agree or agree that the Talking Book and Braille Library has added value to their life.
Delete	USE OF THE OREGON SCHOOL LIBRARY INFORMATION SYSTEM - Average daily visits to the Library-funded Oregon School Library Information System.
New	Value of Library Support Programs and Services - Percent of Oregon library staff that strongly agree or agree that the services and programs offered by Library Support help them provide better library service to their community.
Delete	PUBLIC LIBRARIES MEETING APPLICABLE OLA STANDARDS - Percentage of Oregon public libraries meeting essential and enhanced level of applicable Oregon Library Association Standards for a Public Library.
New	Ready to Read Participation - Total annual participation of youth 0 – 14 years of age in a Ready to Read grant funded activity.



Performance Summary	Green	Yellow	Red
	= Target to -5%	= Target -5% to -15%	= Target > -15%
Summary Stats:	28.57%	28.57%	42.86%

KPM #1	RESEARCH TRANSACTIONS - Number of research assistance transactions for state employees.
	Data Collection Period: Jul 01 - Jun 30

* Upward Trend = positive result



Report Year	2018	2019	2020	2021	2022
Number of Research Assistance Transactions for State Employees					
Actual	8,657	8,423	7,907	No Data	No Data
Target	9,000	9,000	10,000	10,000	10,000

How Are We Doing

Research Transactions include total reference transactions, total outreach presentations, and total document delivery requests. The total number of research transactions has decreased slightly from the previous year, likely impacted by the COVID-19 pandemic and the resulting work transitions for state employees. Reference interactions have reduced in volume, but time spent on these queries is increasing per interaction.

Factors Affecting Results

Librarians are assigned to each state agency to provide research support through our embedded librarian program. The success of this program has led to a significant increase in the number of instruction classes and research support for the projects of state agency staff. The complexity of reference questions has increased as noted by the time spent on these transactions. We continue to use the Reference Transaction Tracker utilizing the READ Scale, (Reference Effort Assessment Data), a six point scale for recording supplemental qualitative statistics. The statistics for reference, outreach, and document delivery are below.

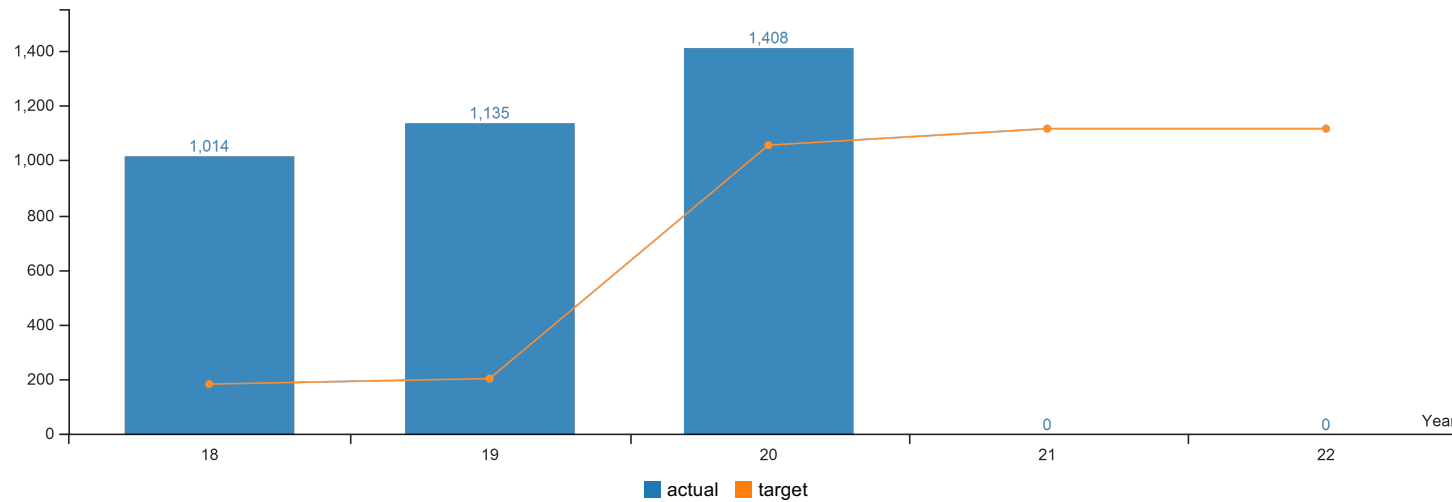
Reference Statistics	2019	2020
Reference Transactions	1820	1559
Time spent on reference transactions	831 hours	757 hours
Average time per transaction	.46 hours	.49 hours

Outreach Statistics	2019	2020
Outreach Presentations (classes)	95	120
Outreach Participants	1207	1637

Document Delivery Statistics	2019	2020
Document Delivery Total	6508	6228

KPM #2	USE OF GOVERNMENT SERVICES ELECTRONIC RESOURCES - Average [daily] use of Government Information and Library Services electronic resources.
	Data Collection Period: Jul 01 - Jun 30

* Upward Trend = positive result



Report Year	2018	2019	2020	2021	2022
Average [daily] use of Government Information and Library Services electronic resources.					
Actual	1,014	1,135	1,408	No Data	No Data
Target	185	205	1,055	1,115	1,115

How Are We Doing

There continues to be robust usage of Research Databases (electronic resources offered by the State Library, Government Information and Library Services Division), with an increase over the previous year.

Factors Affecting Results

Defining and measuring average daily use, when interactions may take place and be counted in a variety of ways depending on the specific database, is complex.

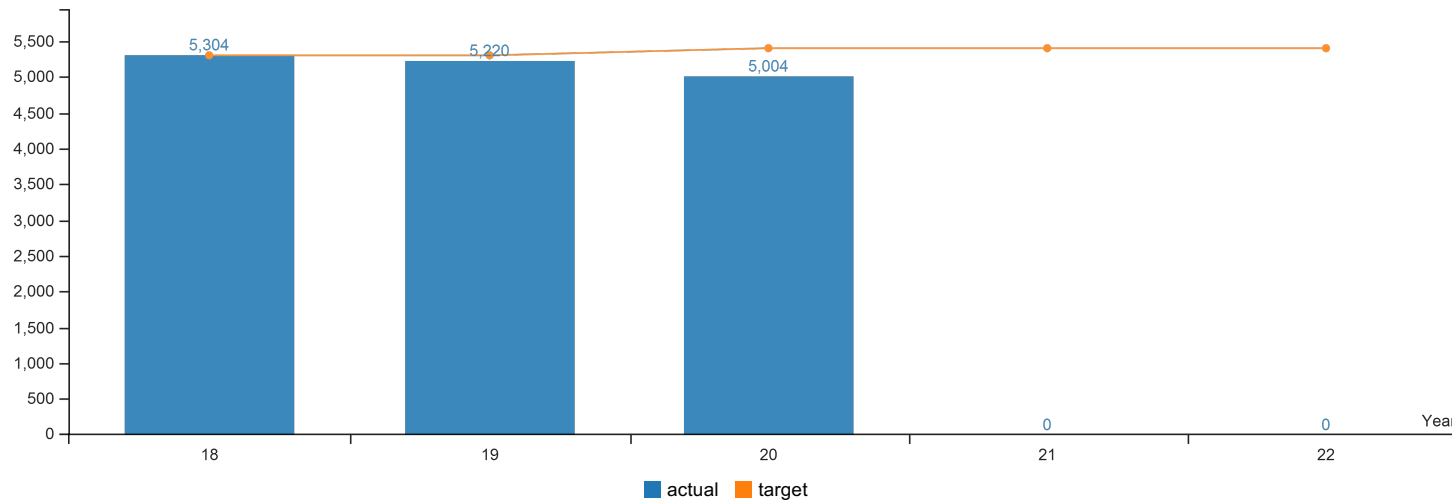
- A Search is when a user enters a search in an e-resource.
- An Action is when a user performs an action to access information related to a source
- A Download is when a user accesses the full text of a source; a specific form of action

The average daily use reported above is a total of the average daily searches, actions, and downloads. These different actions are difficult to fold into a single number, however, due to the variety of formats of our resources (article, ebook, dataset, map, audiovisual, etc.) and how they are used to gather information. The most accurate measure of average daily use is to look at each type of interaction with the resources separately. See table below:

	2019	2020
Average Daily Searches	566	612
Average Daily Actions	357	612
Average Daily Downloads	212	184
Total	1,135	1,408

KPM #3	TALKING BOOK AND BRAILLE SERVICES USERS - Number of individuals registered to receive Talking Book and Braille Services.
	Data Collection Period: Jul 01 - Jun 30

* Upward Trend = positive result



Report Year	2018	2019	2020	2021	2022
Number of Individuals Registered to Receive Talking Books and Braille Services					
Actual	5,304	5,220	5,004	No Data	No Data
Target	5,300	5,300	5,400	5,400	5,400

How Are We Doing

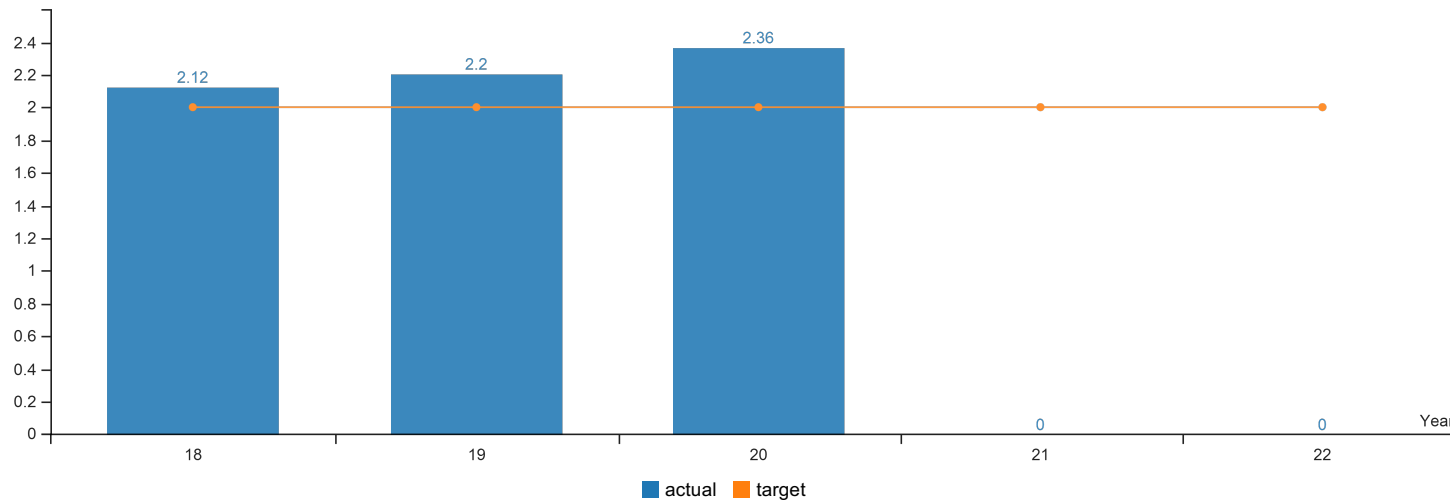
In general, we are holding steady in the number of people registering for the program versus leaving the program through death, lack of interest, or decline in health.

Factors Affecting Results

Outreach activities at the state and national level and the availability of self-serve downloadable books have increased registrations. However, during the statewide stay at home order, our registrations dropped significantly as many of our application certification sources (assisted living, health providers, schools, public libraries, etc.) were closed to the public or only providing limited services. Additionally, our potential patrons were staying home and not visiting or interacting with various professionals who would normally have certified applications for service.

KPM #4	COST PER CIRCULATION - Cost per circulation of talking books and Braille books.
	Data Collection Period: Jul 01 - Jun 30

* Upward Trend = negative result



Report Year	2018	2019	2020	2021	2022
Cost per Circulation of Talking Books and Braille Books					
Actual	\$2.12	\$2.20	\$2.36	No Data	No Data
Target	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00

How Are We Doing

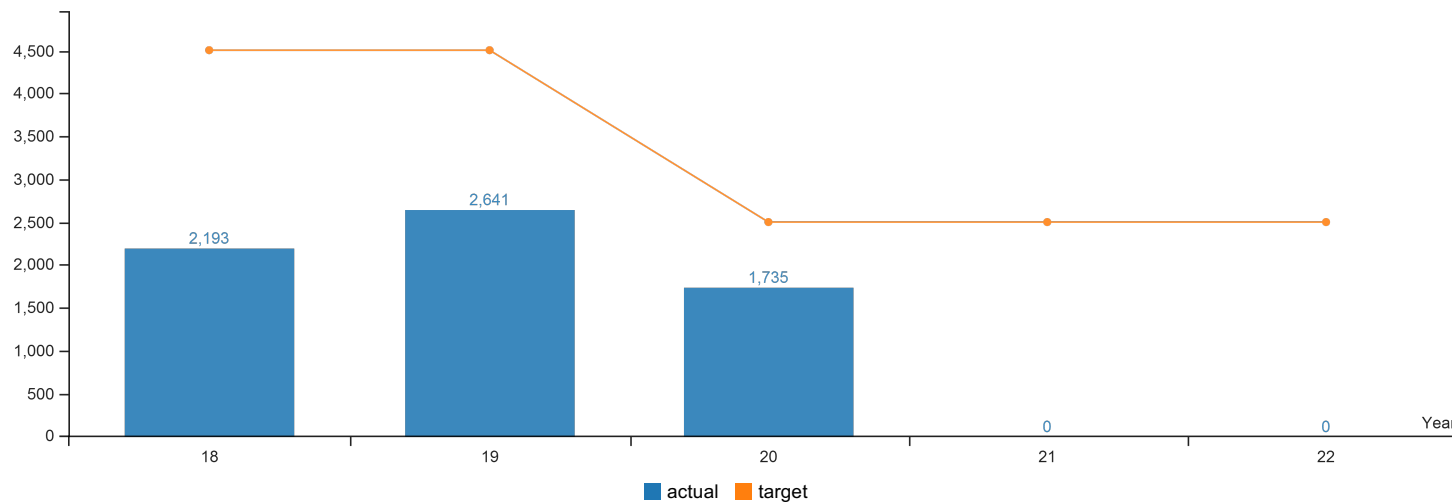
As operational costs increase, such as rent and staff salaries, we anticipate that the cost per circulation will also increase over time. We continue working to register new users and increase circulation by current users to keep the overall cost per circulation down.

Factors Affecting Results

Due to COVID-19, circulation was temporarily suspended until safety measures for circulating materials were put in place. Upon restarting circulation, the library moved from a one-one (one book, one cartridge) service model to a duplication-on-demand (up to 8 titles per cartridge) service model that will increase circulation to patrons due to the fact that they will no longer have to wait for high-demand titles.

KPM #5	USE OF THE OREGON SCHOOL LIBRARY INFORMATION SYSTEM - Average daily visits to the Library-funded Oregon School Library Information System.
	Data Collection Period: Jul 01 - Jun 30

* Upward Trend = positive result



Report Year	2018	2019	2020	2021	2022
Average Daily Visits to the Library-funded Oregon School Library Information System					
Actual	2,193	2,641	1,735	No Data	No Data
Target	4,500	4,500	2,500	2,500	2,500

How Are We Doing

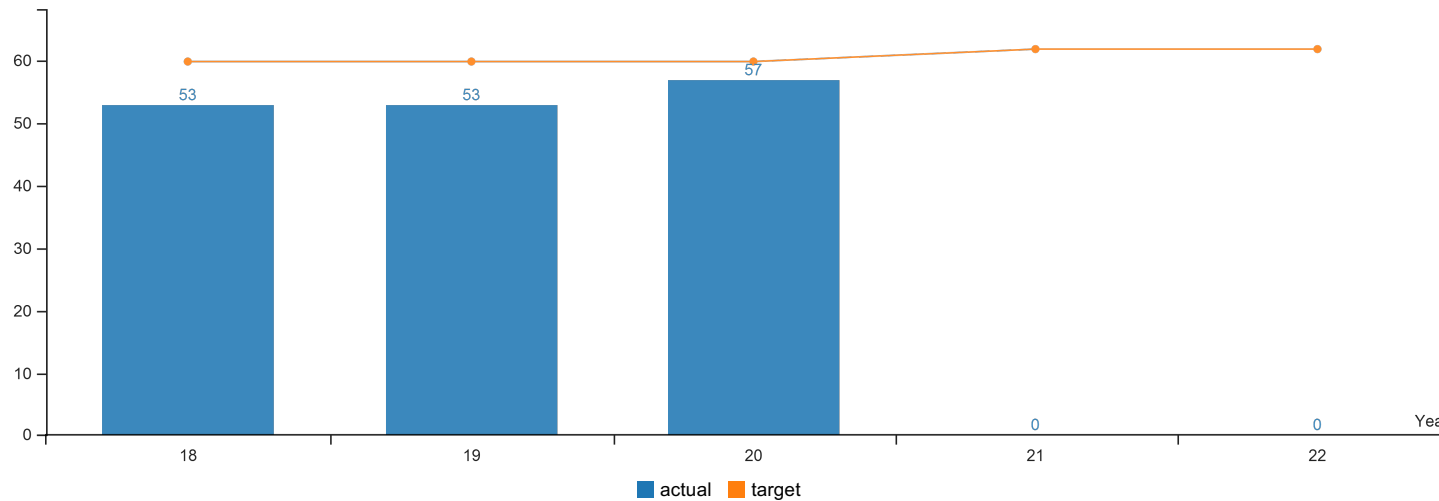
We are below the target and below the average from last year.

Factors Affecting Results

The current Oregon School Library Information System (OSLIS) platform is providing a stable environment for students to access the databases and other materials. However, a twofold effect of a decline in the number of certified school librarians to promote the platform and instruct students and teachers on the resources, and tech savvy librarians linking directly to the statewide databases and bypassing the OSLIS platform are impacting the average daily visits. The COVID-19 pandemic also had a profound impact on the usage during the last quarter of the fiscal year. Teachers were focused on moving to an online learning platform and not on assigning research topics.

KPM #6	PUBLIC LIBRARIES MEETING APPLICABLE OLA STANDARDS - Percentage of Oregon public libraries meeting essential and enhanced level of applicable Oregon Library Association Standards for a Public Library.
	Data Collection Period: Jul 01 - Jun 30

* Upward Trend = positive result



Report Year	2018	2019	2020	2021	2022
Percentage of Oregon public libraries meeting essential and enhanced level of applicable Oregon Library Association Standards for Public Library.					
Actual	53%	53%	57%	No Data	No Data
Target	60%	60%	60%	62%	62%

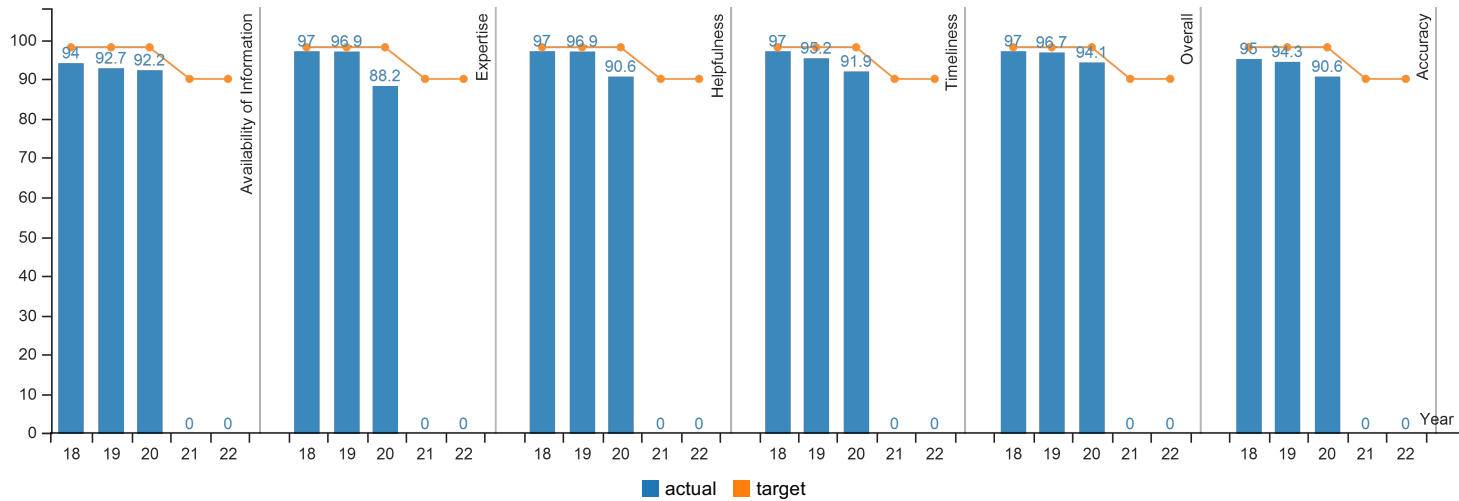
How Are We Doing

There are 136 public libraries in the state, and 61 responded to a survey to report their attainment of the standards versus 112 libraries responding the previous year. Of those libraries that submitted the survey, the overall percentage of libraries meeting 80% of the essential and enhanced standards in the areas of staff, materials, services and programs, and technology is below the target number. However, when the overall percentage number is broken into essential and enhanced, the percentage of libraries meeting 80% of the essential standards is 71%, while 43% of libraries are meeting the enhanced level. This is an increase of 4% in both categories from the previous year.

Factors Affecting Results

The State Library received a lower response rate to the survey that libraries use to report their attainment of the standards than in the previous year, which is due to the COVID-19 pandemic and the closing of libraries. The response rate was approximately 42% in 2018, 82% in 2019 and 45% in 2020. We will continue working with library directors to increase the response rate. In addition, the standards were updated to reflect current practices, with additions and revisions to the criteria in categories such as technology. These changes resulted in more rigorous standards, raising the bar for libraries to meet the essential and enhanced criteria.

KPM #7 CUSTOMER SATISFACTION - Percent of customers rating their satisfaction with the agency's customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, availability of information.
 Data Collection Period: Jul 01 - Jun 30



Report Year	2018	2019	2020	2021	2022
Availability of Information					
Actual	94%	92.70%	92.20%	No Data	No Data
Target	98%	98%	98%	90%	90%
Expertise					
Actual	97%	96.90%	88.20%	No Data	No Data
Target	98%	98%	98%	90%	90%
Helpfulness					
Actual	97%	96.90%	90.60%	No Data	No Data
Target	98%	98%	98%	90%	90%
Timeliness					
Actual	97%	95.20%	91.90%	No Data	No Data
Target	98%	98%	98%	90%	90%
Overall					
Actual	97%	96.70%	94.10%	No Data	No Data
Target	98%	98%	98%	90%	90%
Accuracy					
Actual	95%	94.30%	90.60%	No Data	No Data
Target	98%	98%	98%	90%	90%

How Are We Doing

Expertise and Helpfulness are showing the greatest decline at 8% and 6% respectively. All of the other categories are within three percentage points of last year.

Factors Affecting Results

Surveys with an "N/A" or "don't know" option continue to impact our ability to reach targets. The lack of communications staff to assist with promotion and awareness efforts continues to impact customer ability to identify when services they may already be receiving or utilizing are from the State Library. The response rate in the Library Support & Development Services and Government Information & Library Services Divisions was lower than previous years, likely impacted by the COVID-19 pandemic. The widespread disruption to library operations across the state impacted library worker access to work email and attention was focused on how to serve patrons in new ways. Many state employees transitioned to remote work environments and work priorities shifted dramatically for some employees with attention focused on COVID-19 response and new ways of doing business.