

Oregon State Library
Transformation Project Plan
Document Revision #:0.1
Date of Issue: April 29, 2013
Project Manager: TBD

Approval Signatures

Approved by: Project Sponsor

Approved by: State Librarian

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Document Change Control

This section provides control for the development and distribution of revisions to the Project Charter up to the point of approval. The Project Charter does not change throughout the project life cycle, but rather is developed at the beginning of the project (immediately following project initiation approval, and in the earliest stages of project planning). The Project Charter provides an ongoing reference for all project stakeholders. The table below includes the revision number (defined within your Documentation Plan Outline), the date of update/issue, the author responsible for the changes, and a brief description of the context and/or scope of the changes in that revision.

Version	Date of Issue	Author(s)	Brief Description of Change
V 0.1	April 29, 2013	Sarah Miller	Initial Draft

1. Project Overview

This section of the Project Management Plan provides an overview of the purpose, scope and objectives of the project for which the Plan has been written, the project assumptions and constraints, a list of project deliverables, a summary of the project schedule and budget, and the plan for evolving the Project Management Plan.

1.1 Purpose, Scope, and Objectives

- **Define the purpose and scope of the project.**

The purpose of this project is to lead the planning and implementation of the Oregon State Library transformation, including:

- Eliminate Government Research Services in its current form.
- Consolidate document delivery and reference services in State Archives.
- Reduce costs for other programs by implementing changes from 2011 workgroup.

The 2013-15 Governor's Balanced Budget outlines allocation of the Oregon State Library's second year funds as contingent on the reorganization of the State Library, prior to June 2014.

- **Describe any considerations of scope or objectives to be excluded from the project or the deliverables.**

There are currently no specified scope exclusions from this project.

- **Provide a concise summary of:**

- **the deliverables required to satisfy the project objectives, and**

There are several deliverables that should be expected from this project:

- Project Charter
- Integrated project management plan (this document)
- Mapping of current services delivered (AS-IS state)
- Service delivery alternatives analysis & policy questions (TO-BE state)
- Implementation plan for new TO-BE state
- Status report on progress
- Project close out report

- **the methods by which satisfaction of the objectives will be determined.**

The State Librarian will work closely with the Project Governance structure and with the Legislative Fiscal Office to ensure that the project is proceeding as plan with appropriate Legislative oversight.

1.2 Assumptions, Constraints and Risks

- **Describe the assumptions on which the project is based.**

The approach to this project is built on the requirements of the Governor's Balanced Budget. If the Legislative branch would prefer a different approach or outcome, this project will need to be modified.

- **Describe the imposed constraints and risks on the project schedule**

The project plan assumes that the work to analyze current services, and make recommendations about future services will be completed by September 2013, so that the Legislature can give any policy guidance necessary to the State Library to identify the appropriate future state. The project will review the implementation plan for the future state in December 2013, with implementation work beginning in February 2014.

- **Describe the imposed constraints and risks on the project budget**

The plan assumes that the State Library receives only one year of funding in the 2013 budget, with the second year of funding being held in a special purpose appropriation to be released upon satisfactory report to the 2014 Legislative Session.

The project is budgeting for a professional project manager for a 12 month period of time.

- **Describe the imposed constraints and risks on the project resources**

The project is currently putting two of the Library managers through business project management training to assist with the work of the Transformation project. The project will require close collaboration between library management and library staff (represented by labor) in order to get this work completed.

1.3 Project Deliverables

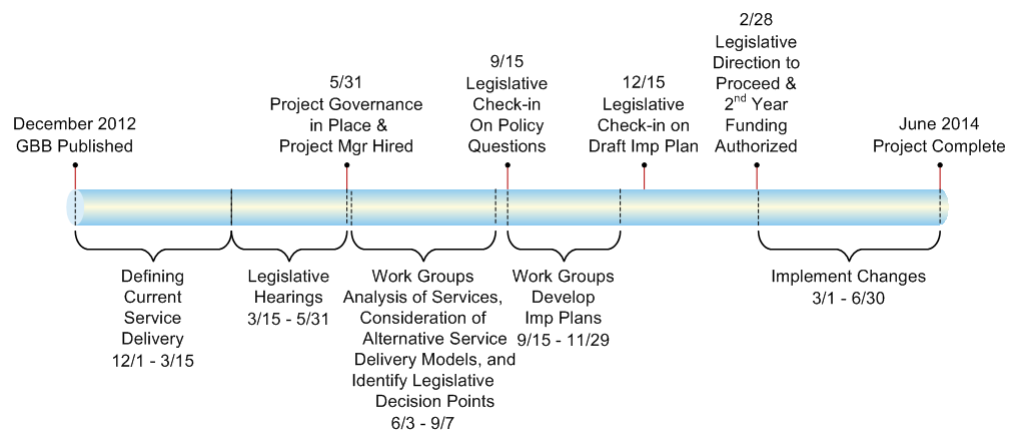
- Identify and list the following, as required to satisfy the terms of the project charter or contract:
 - project deliverables, and
 - delivery dates.

Project Deliverable	Description	Expected Due Date
Project Charter	High-level overview of the project, signed by the project sponsor	May 1, 2013
Project Management Plan (this document)	Defines all aspects of project and project approach	May 31, 2013

Project Deliverable	Description	Expected Due Date
Mapping of current services delivered (AS-IS state)	List of services provided by all parts of State Library	Draft complete now; final due June 30, 2013
Service delivery alternatives analysis & policy questions (TO-BE state)	List of which services should no longer be offered, which services should be moved to another agency, and which services should be provided by State Library – along with any corresponding policy questions for Legislative decision.	Draft by August 1, 2013; final by September 7, 2013
Implementation plan for new TO-BE state	Taking Legislative direction and building plan to implement changes.	Draft by October 1; Final by December 7, 2013
Status report on progress	Monthly	Beginning June 30, 2013
Project close out report	Final report of project process, and lessons learned to be shared with other transformation efforts in state government.	June 30, 2014

1.4 Schedule and Budget Summary

- **Provide a summary of the schedule and budget for the project.**



The project will use existing budget resources of the State Library and the COOs office to complete the work effort. We will use existing staff with the exception of the addition of a project manager to lead the effort.

1.5 Evolution of the Plan

- **Specify the plans for producing both scheduled and unscheduled updates to this Plan.**

Initially, this plan will be updated based on Legislative feedback in the Ways & Means process and after a project manager is hired. Once those updates are complete, the plan will be considered final and will only be updated upon approved change requests (as determined by project sponsor).

- **Specify how the updates to this Plan shall be disseminated.**

This plan and other project documentation will be available on the State Library Website at: *TBD*

1.6 Definitions and Acronyms

- **Define, or provide references to documents or annexes containing the definition of all terms and acronyms required to properly understand this Plan.**

TBD

2. Project Organization

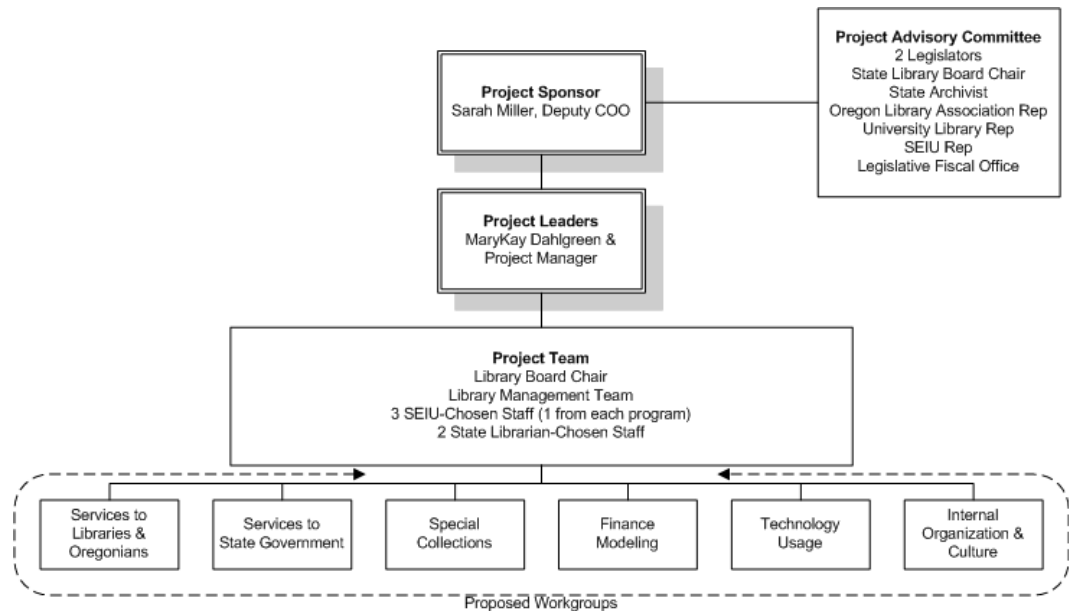
This section of the Project Management Plan specifies the project organization for the project. This section defines the project governance, the project management approach, and the project work groups.

2.1 Project Governance

- **Describe the organizational boundaries between the project and external entities.**

This project will have responsibility to the Project Sponsor who is the Deputy Chief Operating Officer for Oregon State Government, as well as to a Project Advisory Committee as depicted below.

- **Use organizational charts or diagrams to depict the project's external interfaces.**



2.2 Internal Project Structure

- **Describe the internal structure of the project organization.**

As depicted in the organization chart above, the project will be overseen by MaryKay Dahlgreen, the State Librarian and a project manager.

The project team will consist of the State Library Board Chair (or his designee), the Library Management Team, and 5 staff – three chosen by SEIU (one from each program area) and 2 chosen by the State Librarian.

- **Describe the project workgroups.**

The project is proposing six formal workgroups:

- *Services to Libraries and Oregonians* – focus on determine what services should continue to be offered and how, including implementation of ideas from 2011 Workgroup on Transformation.
- *Services to State Government* – focus on determine what services should continue to be offered and how, including evaluation of alternative service delivery models or elimination of services if no longer essential to state government.
- *Special Collections* – focus on determine what collections should be kept and how to fund them.
- *Finance Modeling* – focus on how to fund and finance the state library based on proposed changes.
- *Technology Usage* – focus on readying agency technology to support changes in service delivery.
- *Internal Organization and Culture* – focus on readying the workforce to support the proposed changes.

2.3 Project Stakeholders

The following is a list of stakeholders who will need to be involved in the project.

- State Library Board of Trustees
- Three Library Advisory Councils
- Local Public, School, Academic, & Tribal Libraries
- Oregon State Archives
- Oregon State Poetry Association
- Willamette Valley Genealogical Society
- Oregon Historical Society
- Oregon Heritage Commission
- SEIU
- Legislature
- Oregon Library Association

2.4 Project Approach

To date, the project has undertaken the following work:

- 1) **Defined Current Services** – compiled a list of all services provided by the three divisions of the State Library (Library Development Services, Talking Books & Braille, and Government Research Services)

The lists are attached in Appendix A, and include:

- Name of service
- Customers of service

- Number served
- Mandate for service (Federal Law, State Law, Admin. Rule)
- Current staffing level for service

2) Solicited Feedback & Ideas

- COO's office facilitated 5 employee focus groups with 29 staff (74%) participating to generate ideas
- OSL staff conducted surveys of key stakeholders on use and perceived value of current services
- State Librarian led discussions with State Library Board

3) Defined Vision for Future

- Connect Oregonians to library services by providing leadership, grants and other support to public, school, academic, and tribal libraries.
- Connect print-disabled Oregonians to reading materials and other information to improve their quality of life.
- Connect Oregon state government to quality information to support informed decision-making on behalf of all Oregonians.

The Go-Forward project approach includes:

- 4) Defining the core business processes**
- 5) Considering staff improvement ideas**
- 6) Analyzing service delivery alternatives**
- 7) Implementation plan development**
- 8) Legislative Subcommittee check-ins**
- 9) Implementation and communication strategies**

2.5 Roles and Responsibilities

Projects frequently use a RACI Matrix to define the roles and responsibilities of key parts of the project. RACI stands for Responsible, Accountable, Consulted, and Informed. Responsible is the person who is assigned to do the work. Accountable is the person who makes the final decision and has ultimate ownership. Consulted is a person who must be consulted before an decision is

made or action is taken. Informed is a person who must be informed that a decision was made or has been taken.

Task	COO Office	State Librarian	Project Manager	Stakeholder Advisory Group	Project Team	LFO	Library Board	Stakeholders
1. Project Charter	A	C	R	C	C	C	C	I
2. Integrated Project Plan	A	C	R	C	C	C	C	I
3. Mapping of current services delivered (AS-IS state)	C	A	C	I	R	I	C	I
4. Service delivery alternatives analysis & policy questions (TO-BE state)	C	A	C	C	R	C	C	C
5. Implementation plan for new TO-BE state	C	A	C	C	R	C	A	I
6. Status report on progress	A	C	R	I	C	C	I	I
7. Project close out report	A	C	R	C	C	C	C	I

3. Managerial Process Plans

This section of the Project Management Plan specifies the project management processes for the project. This section defines the plans for project start-up, risk management, project work, project tracking and project close-out.

NOTE: TO BE COMPLETED BY THE PROJECT MANAGER ONCE HIRED

3.1 Work Plan

3.1.1 Work Breakdown Structure

- Define a Work Breakdown Structure (WBS) to specify the various work activities to be performed in the project, and to depict the relationships among these work activities.
- Decompose the work activities to a level that exposes all project risk factors, and that allows accurate estimation of resource requirements and schedule duration for each work activity.
- Specify the following factors for each work activity:
 - necessary resources,
 - estimated duration,
 - products or deliverables of the activity,
 - acceptance criteria for the work activity products, and
 - predecessor and successor work activities.
- The level of decomposition internally within the WBS may vary depending on the quality of the requirements, familiarity of the work, applicable level of technology, etc.

3.1.2 Schedule Allocation

- Specify the scheduling relationships among the project work activities in a manner that depicts the time-sequencing constraints and illustrates opportunities for concurrent work activities.
- Identify the critical path in the schedule.
- Indicate any constraints on the scheduling of particular work activities, that are caused by external factors.
- Identify appropriate schedule milestones to assess the scope and quality of project work products and of project achievement status.
- Techniques for depicting schedule relationships may include milestone charts, activity lists, activity Gantt charts, activity networks, critical path networks and PERT charts.

3.1.3 Resource Allocation

- Provide a detailed itemization of the resources allocated to each major work activity in the project WBS.
- Specify the numbers and required skill levels of personnel for each work activity.
- Specify, as appropriate, the allocation of the following resources:
 - personnel (by skill level),
 - computing resources
 - software tools
 - special testing and simulation facilities, and
 - administrative support.
- Use a separate line item for each type of resource for each work activity.

3.1.4 Budget Allocation

- Provide a detailed breakdown of the necessary resource budgets for each of the major work activities in the WBS.
- Specify the estimated cost for activity personnel, and include as appropriate, the costs for the following items:
 - travel,
 - meetings,
 - computing resources,
 - software tools,
 - special testing and simulation facilities, and
 - administrative support.
- Use a separate line item for each type of resource in each activity budget.

3.2 Project Tracking Plan

3.2.1 Requirements Management

- Specify the process for measuring, reporting and controlling changes to the project requirements.
- Specify the processes to be used in assessing the impact of requirements changes on product scope and quality, and the impacts of requirements changes on project schedule, budget, resources and risk factors.
- In the configuration management processes, specify change control procedures and the formation and use of a change control board.

- In the processes for requirements management, include traceability, prototyping and modeling, impact analysis and reviews.

3.2.2 *Schedule Control*

- Specify the schedule control activities by identifying the processes to be used for the following purposes:
 - to measure the progress of work completed at the major and minor project milestones,
 - to compare actual progress to planned progress, and
 - to implement corrective action when actual progress does not conform to planned progress.
- Specify the methods and tools that will be used to measure and control schedule progress.
- Identify the objective criteria that will be used to measure the scope and quality of work completed at each milestone, and hence to assess the achievement of each schedule milestone.

3.2.3 *Budget Control*

- Specify the budget control activities by identifying the processes to be used for the following purposes:
 - to measure the cost of work completed,
 - to compare the actual cost to the planned and budgeted costs, and
 - to implement corrective action when the actual cost does not conform to the budgeted cost.
- Specify when cost reporting will be done in the project schedule.
- Specify the methods and tools that will be used to track the project cost.
- Identify the schedule milestones and objective indicators that will be used to assess the scope and quality of the work completed at those milestones.
- Specify the use of a mechanism such as earned value tracking to report the budget and schedule plan, schedule progress, and the cost of work completed.

3.2.4 *Quality Control*

- Specify the processes to be used to measure and control the quality of the work and the resulting work products.
- Specify the use of quality control processes such as quality assurance of conformance to work processes, verification and validation, joint reviews, audits and process assessment.

3.2.5 *Reporting*

- Specify the reporting mechanisms, report formats and information flows to be used in communicating the status of requirements, schedule, budget, quality, and other desired or required status metrics within the project and to entities external to the project.
- Specify the methods, tools and techniques of communication.
- Specify a frequency and detail of communications related to project management and metrics measurement that is consistent with the project scope, criticality, risk and visibility.

3.2.6 *Project Metrics*

- Specify the methods, tools, and techniques to be used in collecting and retaining project metrics.
- Specify the following metrics process information:
 - identification of the metrics to be collected,
 - frequency of collection, and
 - processes for validating, analyzing, and reporting the metrics.

3.3 Risk Management Plan

- Specify the risk management plan for identifying, analyzing, and prioritizing project risk factors.
- Specify plans for assessing initial risk factors and for the ongoing identification, assessment, and mitigation of risk factors throughout the life cycle of the project.
- Describe the following:
 - procedures for contingency planning,
 - procedures for tracking the various risk factors,
 - procedures for evaluating changes in the levels of the risk factors and responding to changes in the levels of the risk factors,
 - risk management work activities,
 - procedures and schedules for performing risk management work activities,
 - risk documentation and reporting requirements,
 - organizations and personnel responsible for performing specific risk management activities, and
 - procedures for communicating risks and risk status among the various customer, project and subcontractor organizations.

- Identify and describe the applicable impact of any of the following risk factors:
 - risks in the customer-project relationship,
 - contractual risks,
 - technological risks,
 - risks caused by the size and complexity of the product,
 - risks in the development and target environments,
 - risks in personnel acquisition, skill levels and retention
 - risks to schedule and budget, and
 - risks in achieving customer acceptance of the deliverables.

3.4 Project Closeout Plan

- Identify the plans necessary to ensure orderly closeout of the project.
- Specify the following:
 - a staff reassignment plan
 - a process for archiving project materials,
 - a process for capturing project metrics in the business projects database,
 - a process for post-mortem debriefings of project personnel, and
 - a plan for preparation of a final report to include lessons learned and an analysis of project objectives achieved.

4. Appendix A: Library Development Services

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service (hours/week)	Required Resources
Lead libraries to achieve excellence in services to children and teens					Staff time , computer/int ernet access, budget for travel
Administer state general fund grants to local libraries for early literacy and summer reading activities	Public Libraries	129 libraries receive grants - serving lots of kids	OAR - 353 Div 40 ORS 357.780	Librarian - 1 hr/week for administration and 15 hrs/week for consultation Administrative support - 4 hrs/week	General Funds
Staff working with public libraries to improve services based on best practices	Public Libraries	130 public libraries		Librarian - 10 hrs/week consultation	Federal Funds
Provide summer reading program materials to local libraries	Public Libraries	230 public, volunteer and tribal libraries	Partnership with OLA and member of the National Collaborative	Librarian - 1 hr/week - administrative	Federal funds

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service (hours/week)	Required Resources
Provide intensive, multi-day training for non-degreed staff at local libraries working with children and teens	youth services librarians	20-25 people every other year	Board directed	Librarian - 1 hr/week	Federal Funds
Active participant in governor's P-20 education initiative	Public Libraries, early learning community			Librarian - 6 hrs/week consultation	Federal Funds
Take a leadership role in developing comprehensive statewide library resource-sharing services					
License and purchase online information databases for all Oregonians via their local libraries and Libraries of Orgon website.	School, public, academic libraries		OAR 543-060-0000 ORS 357.206	Librarian - 12 hrs/week in administering, promoting and training	Databases are paid with federal funds Staffing with general funds

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service (hours/week)	Required Resources
Oregon School Library Information Services (OSLIS) website providing access to databases and information literacy activities for all K-12 in Oregon	School libraries and students of Oregon	approx. 560,000 K-12 public school students in Oregon	OSLIS is a project of the Oregon Association of School Libraries (OASL)	Program Analyst - 24 hrs/week coordinating the website, training, reviewing and adding content Librarian 10 hrs/week to provide technical support to the site	Federal Funds
Provide pre-built web sites (Plinkit) to small libraries (public and rural) that are easy to edit and maintain (Including hosting, training and support)	public libraries (small)	60 libraries	Board directed	Librarian - 20 hrs/week creating new sites, updating current sites and training library staff	Federal Funds
Collaborate with five other states to plan and execute improvements to Plinkit that benefit all six states.	5 other states			Librarian - 2 hrs/week Provide Plinkit Oregon and Plinking Collaborative projects with technical support, consulting, and software maintenance.	Federal Funds

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service (hours/week)	Required Resources
<p>Encourage and assist local communities to develop strong school library services and public library services for unserved and underserved Oregonians</p>					
<p>Website that provides access to online databases to Oregonians who do not have local library service (Libraries of Oregon)</p>	<p>Public Libraries and Oregon citizens</p>		<p>Board directed and in cooperation with Oregon State University Library</p>	<p>Librarian - 10 hrs/week Manages the site, collaborated to create new content, and promotes site</p>	<p>Website supported by Federal Funds Staffing is supported by general funds</p>
<p>Quality Education Model report on school libraries provides information about state of school libraries in Oregon</p>	<p>School Librarians and administrators</p>		<p>ORS 357.005(2)(b)</p>	<p>Program Analyst - 1 hr/week - Manages and coordinates the Quality Education Model's (QEM), school library statistics project.</p>	<p>Federal Funds</p>
<p>Support of the above Board goals</p>			<p>-</p>		

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service (hours/week)	Required Resources
Gather and publish public library statistics to assist local libraries in decision making and budgeting	Public Libraries	130 public libraries	ORS 357.520 - Annual rpt. OAR 543-010-0036	Librarian - 20 hrs/week - Collects data, trains public library directors on how to collect and report data, consults with libraries Administrative support 10 hrs/week	Federal Funds

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service (hours/week)	Required Resources
<p>Staff consults with all (public, academic, school and tribal) libraries to improve their services based on current understanding and professional knowledge of librarianship, and in support of programs such as Library Services and Technology Act funded program, Federal Depository Library Program, Summer Reading Program, Early Literacy initiatives and Ready to Read funded programs</p>	<p>Academic, public, school libraries</p>		<p>OAR 357.003</p>	<p>4 Librarians 1 Program Analyst</p>	<p>Federal Funds</p>

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service (hours/week)	Required Resources
Encourage new and innovative ideas to improve library services using federal LSTA grant funds (grants administration)	School, public, academic libraries	Average of 10 grants per cycle - Award pool of \$600,000	Board directed	Librarian - 20 hrs/week Coordinates the program, consults with grantees on projects, and is the liaison with the LSTA Advisory Council Administrative Support 10 hrs/week	General Funds
Coordinate Oregon's involvement in Letters About Literature, a national reading and writing contest for children and teens to reflect on how a book has changed their life; supports Common Core State Standards	1300 schools	800 participants	Center for the Book in the Library of Congress	Program Analyst - 4 hrs/week - Coordination of the program	Federal Funds
Disseminate information about CE opportunities to libraries and librarians	130 public libraries			Librarian - 4 hrs/week - Gather and promote training opportunities in the county	Federal Funds

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service (hours/week)	Required Resources
Center for the Book - Intellectual Freedom Clearinghouse provides information and resources to libraries dealing with challenges and collects data on challenges and compiles the data into an annual report.	School, public, academic libraries		Center for the Book in the Library of Congress	Librarian 4 hrs/week Provide information and resources on intellectual freedom issues in libraries	Federal Funds
Center for the book, special projects that promote books and reading. An affiliate of the Center for the book in the Library of Congress	School, public, academic libraries		Center for the Book in the Library of Congress	Librarian -1 hr/week - Coordinates activities that promote reading, such as the Oregon Book Awards	Federal Funds
Federal Document Program	citizens of Oregon	*MOU partnership with PSU, OSU and U of O	Congressional Designation	Librarian - 12 hrs/week - Liaison with the Government Printing Office, consults with regional and selective depositories in the state	General Funds

5. Appendix B: Talking Book & Braille Services

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service	Required Resources
TBABS program	Blind, low vision, physical and reading disabled	5300 10% of eligible population	MOU with National Library Service (NLS) - division of Library of Congress -- NLS Revised Standards and Guideline of Service - Pratt - Smoot Act		
Materials					
Audio books by Mail	Registered patrons of the program	349,084 circs in the 2012 calendar year	Shall process returned materials within 5 business days		Audio books are provided by NLS, database to used to track items owned, requests made, and patrons who have borrowed books and equipment, and space for books and equipment

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service	Required Resources
Downloadable book	Registered patrons of the program	1236 registered BARD users (KLAS) -- Avg of 6800/month of downloads			
Print Braille	Blind	115 patrons - Circulation - 2300 (2012)	Contract with Utah State Library	SLS2 3 hrs/week	Supported by donation funds
Newspaper by phone or online (NFB-Newsline)	Registered patrons of the program - Eligible people can be just registered for the program	690 patrons (KLAS)	Agreement with Oregon Commission for the Blind and NFB of Oregon	SLS2 1 hr/week	Supported by donation funds
Equipment	Registered patrons of the program		After registration - within 2 business days send equipment		Equipment (players and headphones) are provided by NLS
Collection Management					
Acquisition		3800 new titles per year		SLS2 1 hr/week	
Cataloging		3800 new titles per year		Librarian 20 hrs/week	
Inventory and processing		19,000 volumes per year		SLS2 5 hrs/week	

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service	Required Resources
Monitor supply of books versus demand on collection				SLS2 5 hrs/week	
Duplication		Average of 55 titles per month		SLS2 10 hrs/week	
Interlibrary Loan		Order 40 books per month		SLS2 1 hr/week	
Xess (withdrawing of materials and offering to other libraries)		Cassette completed until 2015 -----Digital books - 800 in 2013		SLS2 5 hrs/week	
Housing		220 - 240 books shelved per day		2 SLS1 10 hrs/week	
Retrieving (books and equipment)		Average 1450 books/day		2 SLS1 20 hrs/week	
Daily bulk shipment of books		Average 1450 books/day		2 SLS1 20 hrs/week	
Daily quality inspection of books and equipment		Average 1450 books/day		2 SLS1 30 hrs/week	
Repair		5 -1 0 books/day		SLS2 5 hrs/week	
Overdues		Average of 300 per month		SLS2 5 hrs/week	
Patron Interaction					

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service	Required Resources
Registration for eligible patrons		1,161 new patrons in 2012	Within 5 business days of receipt initiated service	AS2 10 hrs/week	
Suggesting and entering books and updating patron records		Average 304 calls + email + walkins per week	Within 5 business days of receipt initiated service	3 SLS2 1 AS2 40 hrs/week	
Customer care and retention				3 SLS2, AS2, Librarian 20 hrs/week	
Managing patron requests		Average of 5-10 requests lists per day		AS2 5 hrs/week	
Outreach					
Soliciting new customers		1,161 new patrons added in 2012		Librarian 12 hrs/week	
Customer awareness (newsletter)		Newsletter sent out 3 times per year. Facebook page and website		AS2 5 hrs/week	
Training of patrons (BARD, online catalog)				5 - 10 hrs/week	
Advocacy to national organization and others				Librarian 5 hrs/week	
Fund Development					

Service	Who are the constituents	Number served or Percentage served	Mandated Service	Current Staffing Level for Service	Required Resources
Two annual solicitations			OAR 357.195	Program Analyst 5 hrs/week Student Worker 8 hrs/week	Fund development database (Sage), files, letters, envelopes, bulk mailing
Large Print Calendar				Program Analyst 3 hrs/week Student Worker 4 hrs/week	large print calendar and envelopes
Planned giving program				Program Analyst 2 hrs/week	

6. Appendix C: Government Research Services

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
<p>Provide resource materials to state agency staff via document delivery, web portal SEIC and collections housed at OSL including:</p>	<ol style="list-style-type: none"> 1. Employees of assessed state agencies 2. Other libraries 3. Oregon citizens 4. General public 5. OSL staff 	<p>SEIC= 34,183 fulltime employees, 8,784 registered SEIC users. Anyone has access to the collection in-house, some items circulate only to state employees.</p>	<p>ORS 357.005(2),ORS 357.007 Location of State Library. Subject to ORS 276.004,</p>	<p>selecting, acquiring, cataloging, processing, shelving, circulating, retrieving, housing, mending, weeding, offering, shipping,</p>	<p>ILS subscription (library catalog and circulation system); OCLC service (cataloging, ILLiad for document delivery and Interlibrary Loan); TRIM (to come); web portal and server;</p>
<p>Federal documents P+E+M</p>	<p>Employees of assessed state agencies, other libraries, oregon citizens, general public, OSL staff</p>		<p>Oregon's Regional Federal Depository Library since Nov. 2007</p>	<p>receiving, retrieving, cataloging, processing, shelving, management of program, promoting, housing, (1 staff person in LD and various technical services staff in GRS)</p>	

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
Genealogy (P+F+E)	Oregon citizens, general public		Partnership with WVGS	circulating, retrieving, housing, scanning & copying, processing, staffing 1 Sat per month	
Health and wellness	employees of assessed state agencies			retrieving, shelving, housing, circulating, weeding	
High performance (P+E)	employees of assessed state agencies			acquiring, shelving, housing, retrieving, weeding, circulating, processing, cataloging	
Internal Auditing Library (P)	employees of assessed state agencies			retrieving, shelving, circulating, weeding	
Journals P+F+E	employees of assessed state agencies			acquiring, licensing, housing, retrieving, processing, shelving, circulating, weeding	
Library science P+F+E	employees of assessed state agencies, other libraries,			cataloging, processing, shelving, circulating, retrieving, housing, mending, weeding,	

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
Maps P	Employees of assessed state agencies, other libraries, Oregon citizens, general public, OSL staff			cataloging, processing, shelving, circulating, retrieving, housing, mending, weeding,	
Materials OSL/State of Oregon do not own that are essential to agency staff 's work	employees of assessed state agencies			retrieving, sending (Interlibrary Loan/Document Delivery)	
Newspapers P +F+E	Employees of assessed state agencies, other libraries, oregon citizens, general public, OSL staff			selecting, acquiring, cataloging, processing, housing	
Oregoniana P +E	Employees of assessed state agencies, other libraries, Oregon citizens, general public, OSL staff			selecting, acquiring, cataloging, processing, shelving, circuating, retrieving, housing, mending, weeding, offering, shipping,	
Oregon Book Awards P	Other libraries, oregon citizens, general public, library staff			cataloging, processing, shelving, circulating, retrieving, housing, mending,	

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
Oregon index P (old stuff)	Employees of assessed state agencies, other libraries, Oregon citizens, general public, OSL staff				
Oregon-California Trails Association (P)	Employees of assessed state agencies, other libraries, Oregon citizens, general public, OSL staff			retrieving, shelving, housing, circulating, weeding	
Other government +NGO documents	Employees of assessed state agencies, other libraries, Oregon citizens, general public, OSL staff				
Photographs (P + E)	Employees of assessed state agencies, other libraries, Oregon citizens, general public, OSL staff				
Poetry P	Other libraries, Oregon citizens, general public		Partnership with Oregon State Poetry Association	cataloging, processing, shelving, circulating, retrieving, housing, mending,	

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
Reading group book kits P	employees of assessed state agencies, other libraries				
Specialized online resources (information portals and/or personal learning tools, i.e. Lexis Nexis State Capital, Learning Express)	employees of assessed state agencies			acquiring, negotiating licensing fees, managing subscriptions,	
State documents P +E	Employees of assessed state agencies, other libraries, Oregon citizens, general public, OSL staff		ORS357.003(4)	selecting, acquiring, cataloging, processing, shelving, circulating, retrieving, housing, mending, weeding, offering, shipping,	
Training videos P+E	employees of assessed state agencies				
Manage and maintain collections	1. Employees of assessed state agencies 2. Other libraries 3. Oregon citizens 4. General public 5. OSL staff	Everyone	same as above	90 hrs/wk (excluding digital collections, government docs, cataloging, circulation, retrieving)	Same as above
Acquisition				included above in Collections	
Cataloging				86 hrs/wk	

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
Housing					
Retrieving				done by everyone during working hours; 24 hrs/wk student workers	
Weeding				included above in Collections	
Checking out and checking in				ref desk 35 hrs/wk	
Mending				mostly done by volunteers	
Processing				included above in Collections	
Identification and selection				included above in Collections	
License, purchase, administer electronic resources & tools for State Agency use				included above in Collections	
Digital collections				75 hrs/wk	
Interlibrary loan & document delivery				74 hrs/wk	
Push current information to state agency staff:	Employees of assessed state agencies	34,183 (# of full-time emp.)			
E-clips electronic clipping service	Employees of assessed state agencies	1,374 subscribers		5 to 8 hrs/wk	staff time, computer/Internet access

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
Read all about it Oregon blog	Employees of assessed state agencies, Oregon citizens,			1 to 2 hrs/wk	staff time, computer/Internet access
Reports to the Oregon State Legislature blog	Employees of assessed state agencies, Oregon citizens,			1 to 2 hrs/wk	staff time, computer/Internet access
Online databases and news service alerts to help state employees track breaking information on topics of work-related interest	Employees of assessed state agencies	88,055 delivered alerts/yr.		30 mins to 1 hr/wk	subscription to databases/electronic resources
Bibliographies of topical information	Employees of assessed state agencies			included in reference	staff time, computer/Internet access
Listservs/ mailing lists/ electronic distribution lists	Employees of assessed state agencies	873 lists, 646321 members		1 to 2 hrs/wk	staff time, computer/Internet access
Reference services provides research and reference assistance to state agency staff (and public)	Employees of assessed state agencies, refer Oregon citizens to state agencies	34,183 (# of full-time emp.)	ORS 357.005(2)	75 hrs/wk (excluding training and Reference Room duties)	staff time, access to collections and databases, computer & Internet access,

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
Quick (concise) information (like Google)				included above in Reference	
In-depth information searching and finding so that agency staff can analyze and make decisions				included above in Reference	
Training so that agency staff can effectively use state and other information resources				61 hrs/wk	
Locating materials to respond to an information request				included above in Reference	
Consulting on information and materials organization and sharing library science expertise				included above in Training	
Referrals to appropriate state agencies				included above in Reference	
Test Proctoring for state employees (necessary to maintain licensure, accreditation, etc. for various occupations in fields of public service)				2x/yearly	staff to oversee, computer & Internet access

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
<p>Patron interaction Register patrons Staff Reference desk, answer telephone and assist in person Help public with reference room equipment (scanners, microfilm, copiers, PC) Check out materials to patrons and checking them in upon return Staff Legislative Library, answer telephone and assist in person</p>	<p>Everyone</p>	<p>Everyone</p>	<p>ORS 357.005</p>	<p>Reference Room serviced by GRS staff 35 hrs/wk - Monday - Friday, 10am to 5pm. Interagency agreement w/ Legislative Library for 40 to 45 hrs/wk</p>	<p>Staff time at reference desk (35 hrs/wk; staff time monitoring LiveHelp, L-Net; staff time at Legislative Library (interagency agreement)</p>
<p>Space Public access computers Wireless Chairs + tables Telework facility Local newspapers Poetry Genealogy Meeting rooms Microfilm/microfiche machines/scanners</p>	<p>Everyone</p>	<p>Everyone</p>		<p>Reference Room serviced by GRS staff 35 hrs/wk - Monday - Friday, 10am to 5pm.</p>	<p>upkeep of furniture, rent, janitorial, wireless access, shelving, heat/electricity, equipment maintenance and replacement, computers,</p>

Service	Who are the constituents	Number served or Percentage serve	Mandated Service	Current Staffing Level/hrs. per week	Required Resources
<p>Enrichment for state agency employees and local citizens</p> <ul style="list-style-type: none"> • Lecture series • Exhibits • Book kits 	<p>Lecture & exhibits = Employees of assessed state agencies, Oregon citizens, general public; Book kits = state employees & other libraries</p>	<p>Primarily state employees and people from Salem area.</p>		<p>Lecture = 10x/yearly; staff time = 90 to 110 hrs/year Exhibits = every 1 to 2 years; staff time = 30 hrs/per exhibit</p>	<p>supplies, promotion, time, use of space,</p>
<p>Consult on the organization and functioning of Oregon's internet presence while also administering the search engine for Oregon.gov</p>	<p>Oregon citizens, state employees</p>	<p>3,975 visits to Oregon.gov search box</p>		<p>24 hrs/wk</p>	<p>time, expertise, computer/IT stuff</p>
<p>Provide access to Oregon state government documents, electronically and in print</p>	<p>Everyone</p>	<p>Everyone</p>	<p>ORS 357.003(4)</p>	<p>32 hrs/wk</p>	<p>time, expertise, computer/IT stuff, cataloging, storage (electronic & in-house), supplies,</p>