

Confidential

# JCPL Organizational Analysis

Board Update

December 14, 2017



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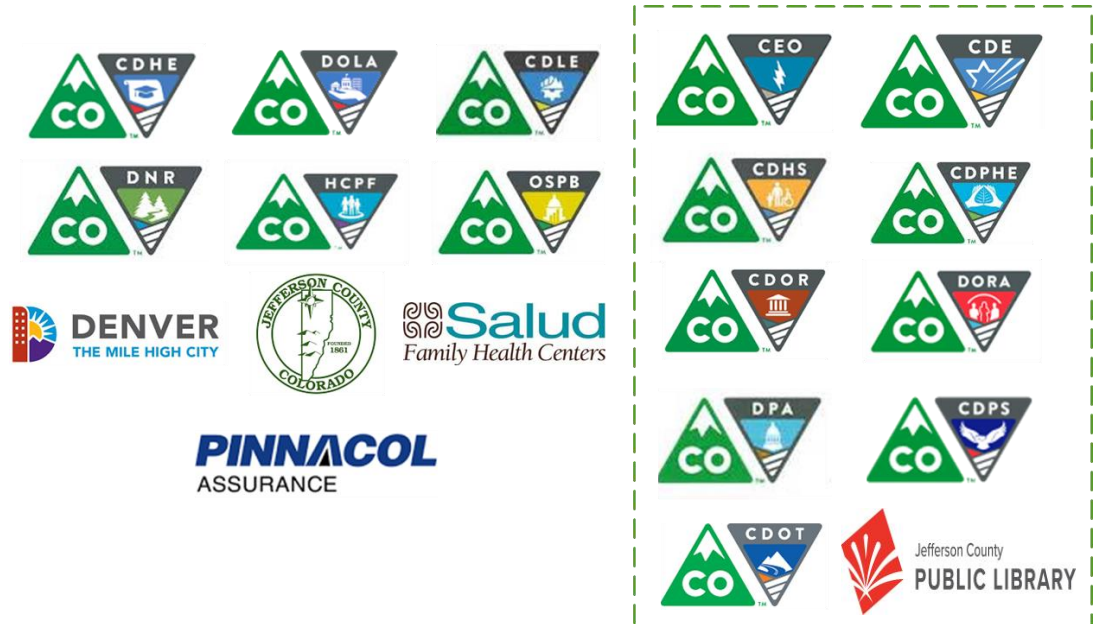


# Who is GPS?

Government Performance Solutions, Inc. (GPS) is:

- A Denver-based small business founded in 2013
- Focused on helping Public Sector leaders drive operational performance by:
  - Conducting organizational assessments
  - Identifying mission critical functions
  - Building capacity to better meet the needs of citizens

In the last 24 months, we have completed high-priority engagements with many of Colorado's largest public-sector agencies. The nine agencies outlined below involved organizational assessments.



# The GPS Team

Ours is an all-senior team, each with at least 15 years experience in organizational design and performance.



Greg

Kate

Kevin

## GPS Team Partnering with JCPL:

Greg Bellomo — Managing Partner, Engagement Leader

- 20 years of experience organizational effectiveness and operations strategy
- 6 years of public sector consulting with 5 operational assessments

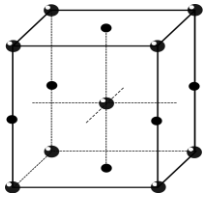
Kate Newberg — Principal, Analysis & Insights

- 15+ years in organizational effectiveness across consulting and operations
- 6 years of public sector experience with 3 organizational assessments

Kevin Mindenhall — Principal, Analysis & Insights

- 20+ years of quality and organization effectiveness consulting
- Led several organizational analysis projects in public and private sectors

# How We Work



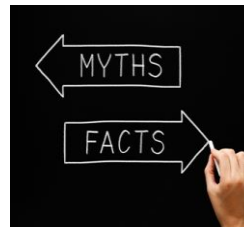
We provide structure by:

- Keeping the group on task
- Using proven constructs



We encourage collaboration by:

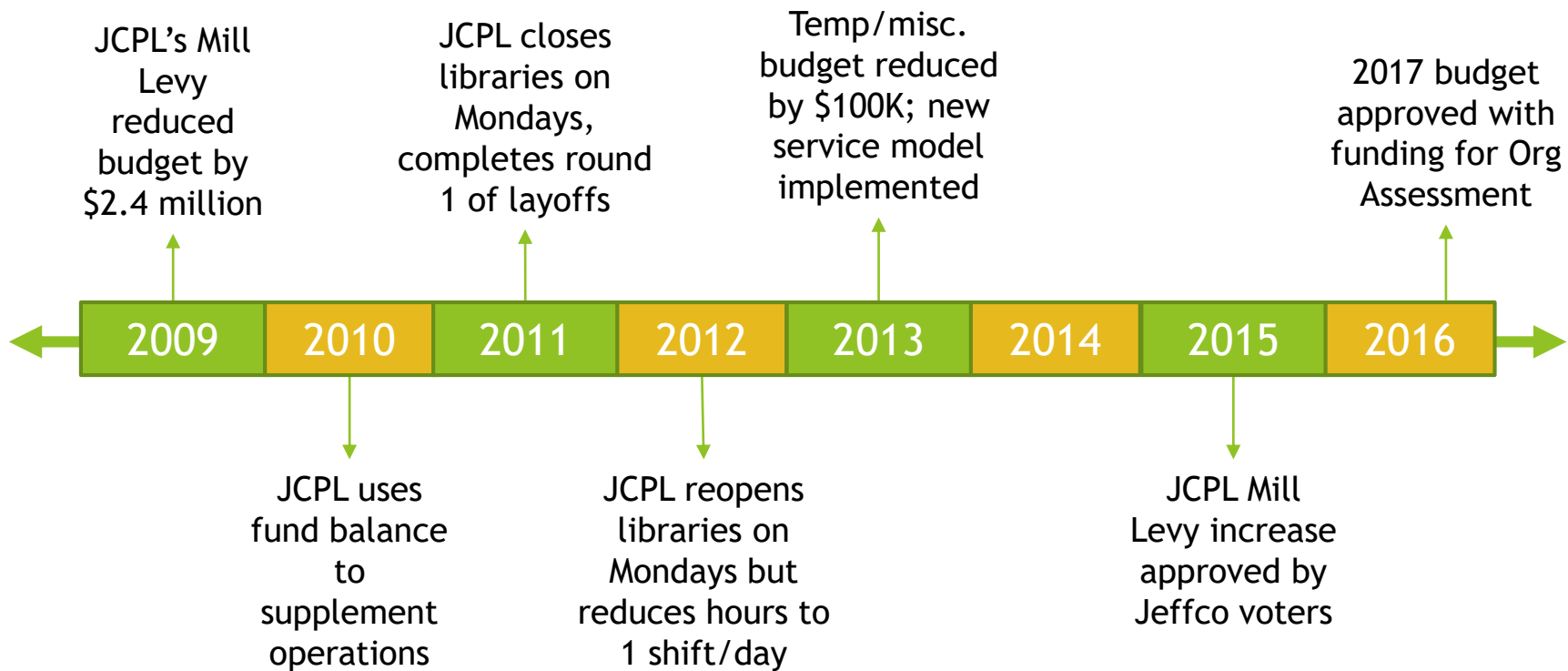
- Stimulating active participation
- Inspiring fun



We respectfully challenge by:

- Separating facts from myths
- Focusing on being effective

# Background



# Engagement Objectives

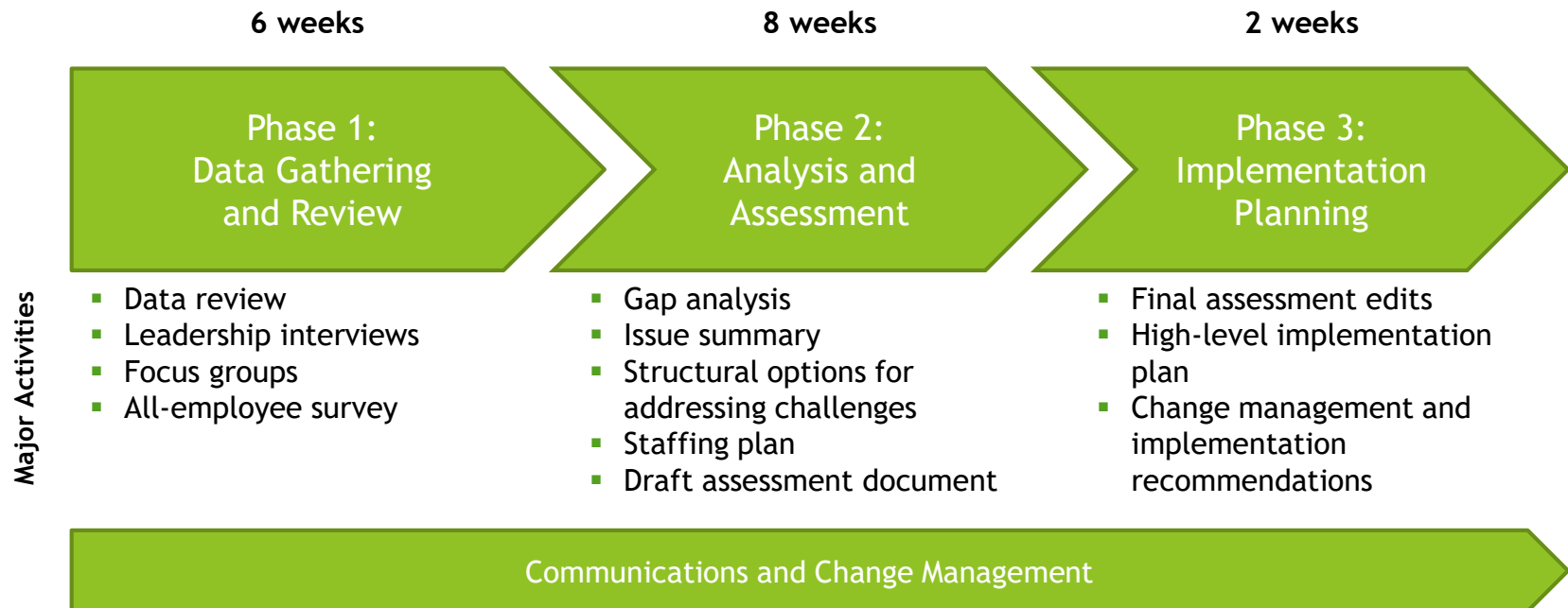
JCPL engaged GPS in June 2017 to conduct an organizational assessment with the following objectives:

1. Analyze and evaluate the effectiveness of JCPL's current organizational structure, distribution of functions, and staffing levels
2. Define future organizational structures that promote cross-collaboration and accelerate the achievement of strategic and operational goals
3. Establish staffing levels that allow JCPL to operate efficiently today and that can be quickly adjusted to meet future needs
4. Adjust roles/responsibilities to create meaningful, fulfilling jobs that are easy to source in today's employment market

# Organization Assessment Process

GPS engaged JCPL in a collaborative, consensus-building process over 16 weeks

- Interviewed 30 leaders and key staff
- Facilitated 11 Focus Groups, engaging more than 100 employees
- Conducted an all-employee survey with 200 responses
- Held 5 SMT workshops and 3 CMT workshops
- Reviewed peer performance data and organizational designs





# Executive Summary

- JCPL Performance in Relation to Peers
- Summary of Recommendations
- Organizational Structure and Staffing
- High-level Phased Implementation Plan for FTE Additions

# JCPL's Performance Compared to Peers<sup>1</sup>

Benchmarking Use and Staffing Parameters	JCPL Ranking 2016 <sup>2</sup>
Circulation Per Capita	1
Circulation per public service hour	2
Library Visits Per public service hour	2
Staff Expenditures	12
Total Paid Staff Hours (calculated by PLDS)	10
FTE (Full Time Equivalent) Per Year	10
FTE Per 1,000 Capita	11
FTE Per 1,000 Circulation	13

..JCPL's circulation and visits are near the top of the peer group...

...while staffing levels rank near the bottom of the peer group.

1: Based upon 2016 peer group data with a 14-member group. 2: The peer group rankings are arranged from 1 (highest) to 14 (lowest).

# JCPL Staffing Gap Compared to 2016 Benchmarking Peers

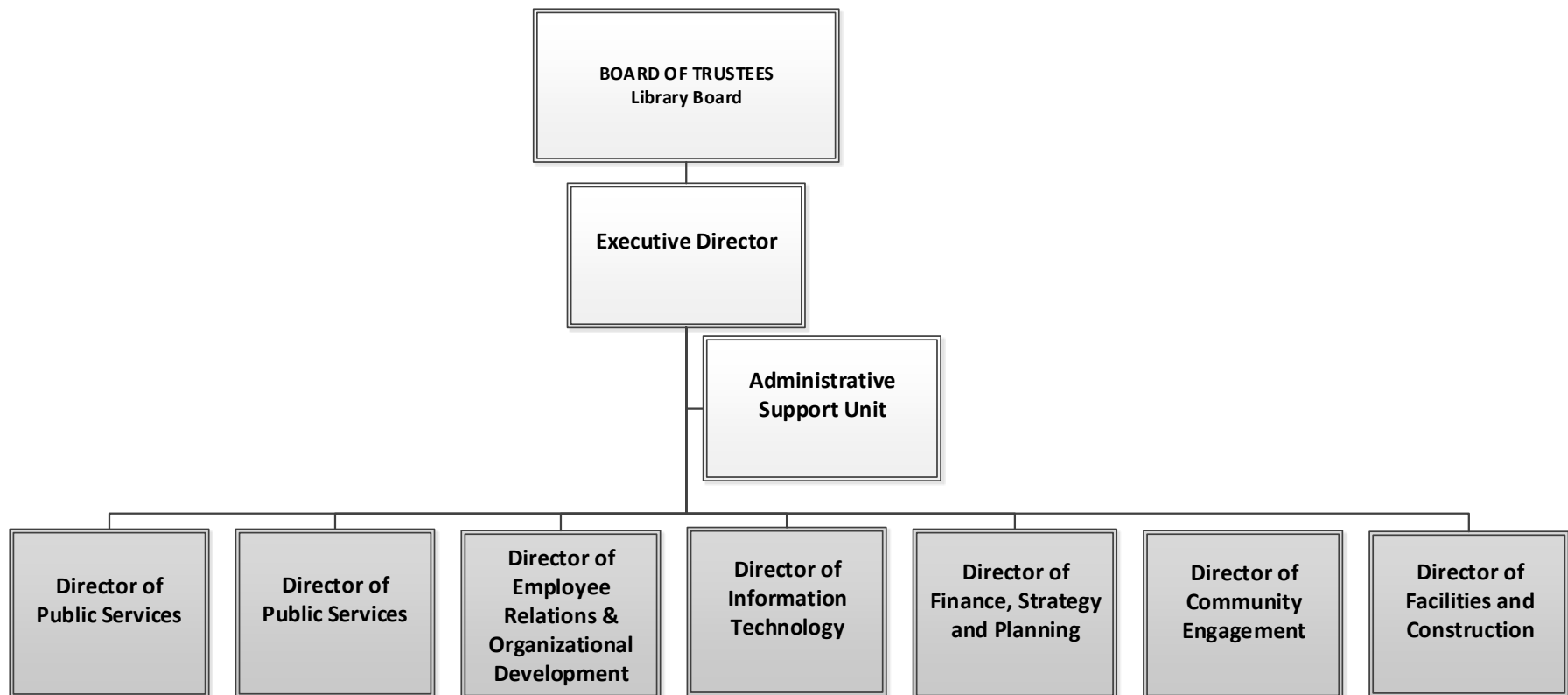
JCPL's staffing gap to the 50<sup>th</sup> - 75<sup>th</sup> percentile of the peer group is estimated to be **43 - 72 FTEs** and from **\$2,000,000+ to \$9,000,000+** in staff expenditures.

Staffing Levels:	Peers at 50th percentile (median)	JCPL	+ or - JCPL	Peers at 75th percentile	+ or - JCPL
FTE <sup>1</sup>	287	244	<b>-43</b>	316	<b>-72</b>
Staff Expenditures	\$17,552,463	\$15,371,707	<b>-\$2,180,756</b>	\$24,836,983	<b>-\$9,465,276</b>
Staff Expenditures as percent of operating	63.09%	58.43%		68.13%	

1: FTE used in benchmarking represents the number of 40-hour equivalents, as calculated by PLDS. This calculation includes all paid hours, including temporary staff, and is hence higher than the 208.5 budgeted (215 approved) FTE count.

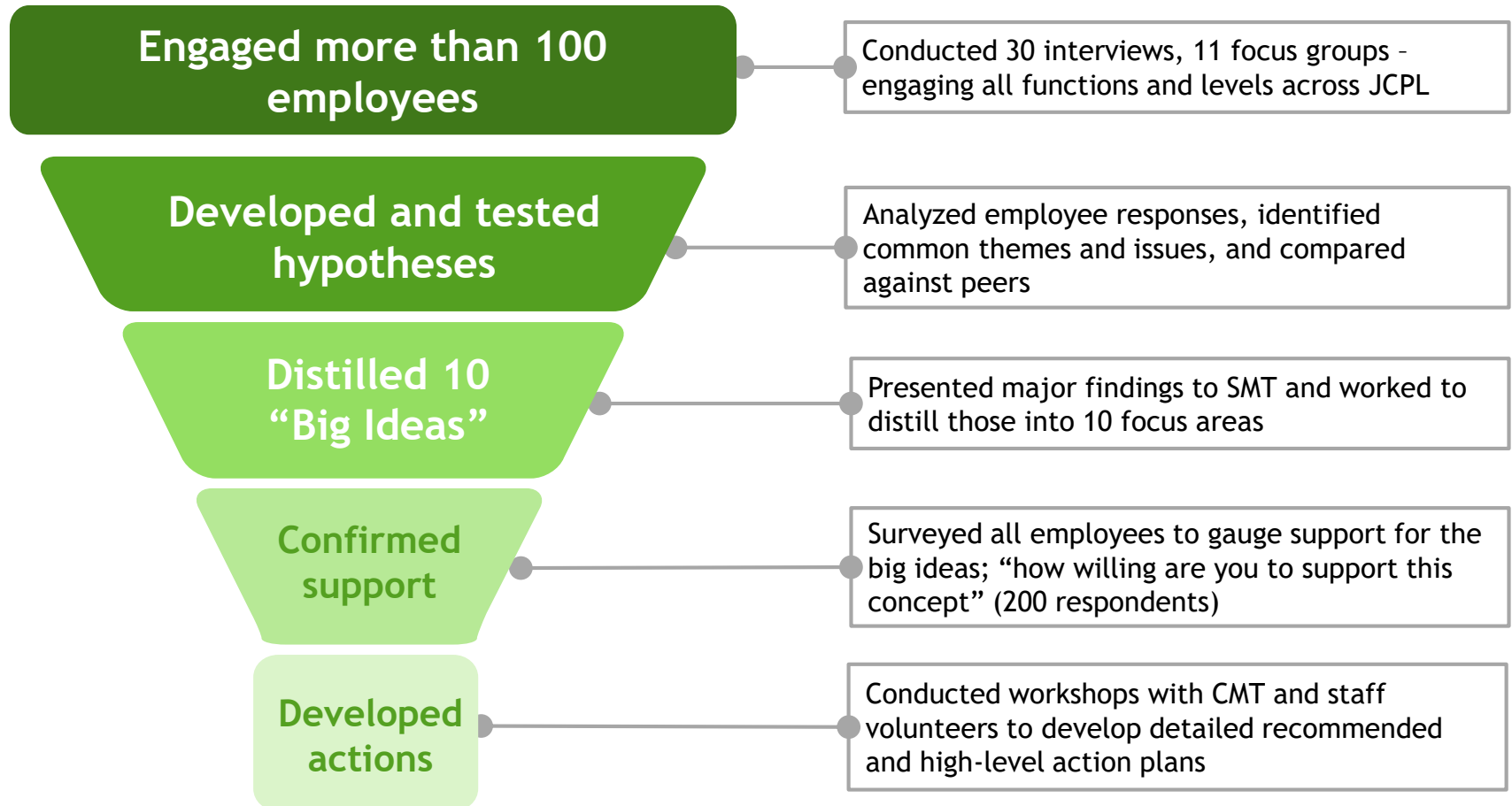
# JCPL High-level Organizational Structure

GPS' conclusion is that the existing Senior Management Team (SMT) structure, with a few modifications, is more than adequate over the near term. The SMT works well together and has clear roles and responsibilities. Increasing staffing to the 50th percentile level of JCPL's peers will remove barriers to success, provide the ability to meet patron needs and improve staff work experience and morale. Options for organizational structural changes should be considered as senior leaders retire or leave the organization.



Note: Significant changes are proposed in the scope of each Director role which may result in reclassification of these positions.

# Recommendation Development Process



Note: Focus group inputs that were not related to Organization Structure and Staffing were captured in a "Parking Lot" and provided to SMT members for further action. A number of suggestions are already in progress and those will be communicated to employees via *Green Sheets*.

# Recommendation Summary (1 of 4)

GPS has developed 10 recommendations and related proposed actions, which are summarized below:

- 1: Increase Patron Experience (PX) staffing levels to provide desired experience while improving PX work experience and morale**
  - 1a:** Increase on-the-floor resources to provide desired patron service levels while allowing staff development and project time
  - 1b:** Add FTEs per the PX staffing model for existing facilities and the new Edgewater library
  - 1c:** Acquire expertise in areas such as technology and Spanish language when increasing staff
- 2: Revise the Operations model to enrich jobs, provide for employee development and meet entry-level market realities**
  - 2a:** Add additional Operations Pages and create part-time benefitted Page positions
  - 2b:** Upgrade expectations and training for Operations staff to enhance merchandising, collection maintenance and customer service capabilities
- 3: Re-align core service functions and provide additional support for PS Managers and teams**
  - 3a:** Create full-time managers for several Core Services, including Kids and Families, Programming, Adult Services and Stats
  - 3b:** Increase staffing in the select Core Services to fill existing gaps and unmet needs
  - 3c:** Investigate the specific support required for individual managers, perhaps utilizing the services of a contracted organizational design consultant

# Recommendation Summary (2 of 4)

## Recommendations continued:

### 4: Implement changes to the current substitute model by providing a floating pool of PX staff

4a: Establish a centrally-managed PX Floater pool to provide absentee coverage and drive consistency across locations

- Staff the floater pool with 1 supervisor and 6 PX staff
- Maintain a smaller roster of existing Temp Subs to fill unplanned absences and cover peak demand periods

### 5: Realign roles and staffing to support the increased collections budget

5a: Evaluate the responsibilities and workload of the ILL/Acquisitions lead. Increase LSC staffing by 1 ILL/Acquisitions Associate and evaluate the need for additional staff

5b: Evaluate the responsibilities and workload of the Data Base Maintenance (DBM) lead. Increase receiver/processor by 1 FTE to meet demands while evaluating the need for additional staff

### 6: Enhance community engagement, partnerships and communications to achieve strategic goals

6a: Add a Manager of Community Engagement with system-wide responsibility for coordination of strategic partnership development (targeted) and opportunistic partnerships (responsive)

6b: Provide volunteer opportunities for Jeffco's highly-skilled citizens to participate in advancing Library programs and goals

6c: Move Volunteer Coordinator into Community Engagement unit to improve coordination and alignment

# Recommendation Summary (3 of 4)

## Recommendations continued:

### **7: Add a Safety and Security function to address increased numbers of incidents and staff concerns**

- 7a:** Add a Security Manager to the Facilities Division to oversee Safety and Security and coordinate system-wide training as well as to provide a more-consistent interface to the community and law enforcement
- 7b:** Create a formal incident monitoring system to refine Security support as incidents ebb and flow
- 7c:** Provide staff training on the JCPL Code of Conduct, de-escalation techniques and dealing with difficult patrons

### **8: Increase staff development and training functions and centralize these under Employee Relations and Development**

- 8a:** Add a Training Manager and Coordinator to ERD staff to develop and support a formal training program for various staff levels
- 8b:** Utilize Library staff to teach selected specific training modules
- 8c:** Add Masters of Social Work (MSW) Support Specialist to provide patron services, training and support for staff in dealing with patrons in need
- 8d:** Take advantage of technology such as a Learning Management System (LMS) to enable some self-service training modules



# Recommendation Summary (4 of 4)

Recommendations continued:

**9: Add specific support functions (Communication, Finance, Facilities, ERD and IT) to support the planned growth in staff and facilities**

**9a:** Increase support departments' specific staffing levels as outlined in the next section of this report, which includes:

- Providing a home for the Strategic Planning coordination function in the new Finance Director's role
- Adding a construction support and facilities staff to accommodate expansions
- Filling an existing gap by creating Patron Tech support roles to enhance technology training and support
- Increasing resources for accounting and contracting
- Adding capacity in graphics, production and marketing
- Increasing resources to support recruitment

**10: Engage in succession planning and employee development to set up JCPL for future success**

**10a:** Establish a succession plan by identifying a cadre of future leaders and providing coaching, mentoring and training support

**10b:** Develop options for consolidation and realignment that could be exercised in the event of an SMT retirement

# Recommended FTE and Budget Impact

The table below summarizes the proposed FTE additions by functional unit and the budgetary implication of these changes<sup>1</sup>. The changes will be phased in over several years as strategic initiatives and facilities changes take effect. Eighty percent (80%) of JCPL personnel are Public Services employees.

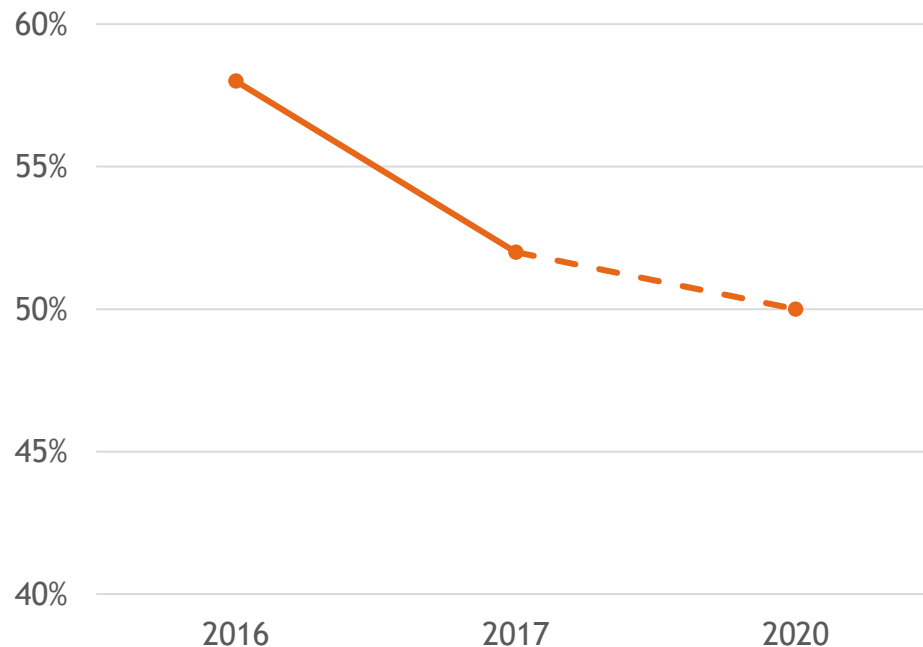
JCPL Department	Current FTE (including Temp hours)	Estimated New FTE	Temp to Standard	Budget Offset (\$000s) <sup>3</sup>	Estimated Budget \$
Public Services	195.25	43	24.5	\$ 563	
ERD	6	2.5	1	\$ 31	
IT	14.5	6.5	2	\$ 67	
Finance, Strategy & Planning	6	3			
Facilities & Construction	10	3			
Communications	7.25	2.75	1.75	\$ 89	
ASU	5	2			
<b>Total FTE</b>	<b>244</b>	<b>62.75</b>	<b>29.25</b>	<b>N/A</b>	
<b>Estimated Budget Impact (\$000s)</b>		<b>\$3,417</b>	<b>\$1,229</b>	<b>\$ 750</b>	<b>\$3,896</b>

1: This analysis is confined to current locations and the new Edgewater facility. Any further expansion will require additional staff.

2: All figures rounded to the nearest thousand. Adding complete figures may result in a rounding error up to \$1,000.

# Operating Budget Implication

Operating Budget Spent on Personnel



- More than half of the current JCPL workforce is temporary (part time non-benefitted employees).
- In 2017, JCPL will spend 52% of the operating budget on personnel, a reduction of 6% from 2016.
- If the Board approves the full 4.5 mills in 2019-2020 and adds \$3.9 million in personnel costs over the same period, JCPL is projected to spend 50% of its total operating budget on personnel costs <sup>1</sup>.

1: This figure does not include debt service or capital projects.

# Implementation Considerations

Based on our experience with the organization, GPS recommends the following guidelines be considered during implementation:

- The critical changes needed in 2018 are known, but JCPL must develop the plans to begin the hiring, onboarding and training for multiple new positions in 2019 and beyond
- Contracting for ERD, Safety and Security and MSW support services in 2018 will provide an opportunity to lay the groundwork for adding staff in these areas in 2019
- A number of planned changes can be piloted at one or more locations to prove and refine concepts prior to system-wide rollout
- Organizational needs and change options should be considered as SMT members retire or leave the organization, similar to adding the strategic leadership function to the new Finance Director's role
- Leaders must continue to engage staff deeply and secure sponsorship down a level from the SMT, considering these changes to be leadership coaching and development opportunities
- Leadership will need to provide thoughtful guidance, policies and procedures to allow staff additional decision-making authority and foster an atmosphere of innovation
- Change management, engagement and communications will continue to be required as change is implemented



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# Appendix: Detailed Recommendations

# 1. Increase Patron Experience (PX) staffing levels to provide desired experience while improving PX work experience and morale

## Situation and Issues

- Gaps in staffing exist for key PX needs such as Patron Tech Support, STEAM, Maker and Spanish language
- Approximately 50% of vacations, unplanned absences and unfilled vacancies result in staff shortages that must be filled by existing staff, resulting in employees stress and risk for the patron experience (See recommendation #4)
- Managers at some Library locations are stretched thin with responsibilities for Core Services and managing the Libraries (See recommendation #3)

## Proposed Actions

- 1a: Increase on-the-floor resources to provide desired patron service levels while allowing staff development and project time
- 1b: Add FTEs per the PX staffing model for existing facilities and the new Edgewater library
- 1c: Acquire expertise in areas such as technology and Spanish language when increasing staff

## Rationale

- While PX staffing has increased as library hours have expanded, the patron demand has exceeded initial expectations
- JCPL ranks at the bottom in staffing v. its peer library organizations in terms of staffing levels
- PX staff report sacrificing lunches, breaks and off-desk time to provide on-the-floor support
- Unanimous focus group support for increased PX staff
- Strongest all-employee survey support for this Big Idea

## Benefits and Impact

- Increased staffing will enhance patron experience
- Improved ability to develop and deliver high-demand patron services
- Increased ability to cover unplanned absences
- Improved work/life balance and morale
- Enhanced ability to deliver innovative programs and services

## 2. Revise the Operations model to enrich jobs, provide for employee development and meet entry-level market realities

### Situation and Issues

- Focus group participants indicate that Operations staff feel like “second-class citizens” compared to other Public Services staff
- Ops career development and advancement opportunities are limited
- Operations Supervisors can have 20+ direct reports, plus volunteers, which limits their ability to provide coaching, training and mentoring
- The TEMP category which limits employees to 12-16 hours per week, while providing a work-around to the JCPL FTE count limitation, may not be sustainable in the current entry-level employment market

### Proposed Actions

- 2a: Add additional Operations Pages and create part-time benefitted Page positions<sup>1</sup>
- 2b: Upgrade expectations and training for Operations staff to enhance merchandising, collection maintenance and customer service capabilities

### Rationale

- Additional Operations Pages and part-time benefitted Pages provides a career ladder for Operations staff while providing flexibility to cover unplanned absences
- The statutory minimum-wage increase to \$12/hour in 2020 signals increased competition in the entry-level employment market
- The PT benefitted Page category will enable improved retention in the competitive entry-level employment market

### Benefits and Impact

- Operations takes on additional value adding responsibilities for collection maintenance and merchandising
- Reduced turnover of Pages in tight entry-level job market
- Provides a career path for Operations staff
- Part-time benefitted Pages provide enhanced absentee/vacation coverage

1: Described in the revised Operations Model and 5-year staffing plan; PT benefitted Pages replace Temp Page hours one-for-one



### 3. Re-align core service functions and provide additional support for PS Managers and teams

#### Situation and Issues

- The core service model has worked well over the past several years to meet community needs while JCPL was financially constrained
- In some cases Library managers have been stressed by the demands of managing both the library and one or more core services
- Core service focus groups cited unmet needs particularly for elementary children, patron tech support, maker space and Spanish
- The model can be enhanced to improve coordination, alignment and fill existing gaps (elementary school ages)
- Focus groups indicate additional support is required, but it is not “one size fits all”

#### Rationale

- Creating single-focused core-services managers reduces stress while providing additional resources to address population critical focus areas
- The Core Service Coordinator (or Manager) position is a logical development position for future leaders and these individuals should be mentored to develop leadership skills and incorporated into succession plans

#### Proposed Actions

- 3a: Create full-time managers for several Core Services, including Kids and Families, Programming, Adult Services and Stats
- 3b: Increase staffing in the select Core Services to fill existing gaps and unmet needs<sup>1</sup>
- 3c: Investigate the specific support required for individual managers, perhaps utilizing the services of a contracted organizational design consultant

#### Benefits and Impact

- Realigning core service responsibilities will provide improved coordination while adopting a more strategic, aligned approach
- Improved community engagement by providing high-value services targeted at known and emerging community needs
- Core service leaders provide a logical pool of future JCPL leaders

1: See staffing plan on pages 38-39 for details

## 4. Implement changes to the current substitute model by providing a floating pool of PX staff

### Situation and Issues

- Patron Experience (PX) focus groups cited problems with absentee coverage for vacations, sick time and unfilled staff vacancies that keeps them from off-desk priorities
- PX staff cited stress to keep up with patron and program demands
- PX staffing is short by 15 FTEs over the past year due to unplanned absences, vacations and unfilled vacancies

### Proposed Actions

- 4a:** Establish a centrally-managed PX Floater pool to provide absentee coverage and drive consistency across locations
- Staff the floater pool with 1 supervisor<sup>1</sup> and 6 PX staff
  - Maintain a smaller roster of existing Temp Subs to fill unplanned absences and cover peak demand periods

### Rationale

- Vacancy analysis indicates that subs fill only half of all absences
- The PX staffing model is thoughtful and has been revised to update assumptions for increased patron demand, training and programs, but absentee coverage for 15 FTE explains the gap between focus group feedback and the model

### Benefits and Impact

- The PX Floater pool relieves the stress experienced by PX staff due to absence and vacations
- PX Floaters, by virtue of their exposure to multiple facilities and engaging broadly with staff would also provide a pool of potential future leaders

1: The pool supervisor would possibly also manage the Temp Sub group and coordinate filling vacancies

## 5. Realign roles and staffing to support the increased Collections budget

### Situation and Issues

- Collections staff indicate that they are behind schedule in certain tasks such as materials selection, receiving and processing
- Collections has a sustained backlog in receiving processing functions
- The increased collection volume requires the leads to perform daily maintenance and support which results in them being unable to perform their lead functions

### Proposed Actions

- 5a: Evaluate the responsibilities and workload of the ILL/Acquisitions lead. Increase LSC staffing by 1 ILL/Acquisitions Associate and evaluate the need for additional staff
- 5b: Evaluate the responsibilities and workload of the Data Base Maintenance (DBM) lead. Increase receiver/processor by 1 FTE to meet demands while evaluating the need for additional staff

### Rationale

- Collections budget has expanded as a result of the mill levy placing pressure on the staff's ability to acquire and process the increased volume in a timely manner
- Maintaining the collection volume and quality is critical to support patron goals and expectations

### Benefits and Impact

- Improved quality control of collection and efficiency
- Roles aligned with job responsibilities promote accountability

## 6. Enhance community engagement, partnerships and communications to achieve strategic goals

### Situation and Issues

- Community Partnerships lacks a home and this function must be intentional, strategic and focused
- Achieving JCPL's strategic goal of supporting shared community outcomes will require increased promotion, partnership, marketing and communications capability
- Focus groups report confusion on the process for establishing partnerships
- Partnerships have increased dramatically over the years but the methods are inconsistent, potentially reducing collective impact

### Proposed Actions

- 6a: Add a Manager of Community Engagement with system-wide responsibility for coordination of strategic partnership development (targeted) and opportunistic partnerships (responsive)<sup>1</sup>
- 6b: Provide volunteer opportunities for Jeffco's highly-skilled citizens to participate in advancing Library programs and goals
- 6c: Move Volunteer Supervisor into Community Engagement unit to improve coordination and alignment

### Rationale

- Community engagement and partnerships are a critical lever to moving the organization's impact beyond the library walls
- Benchmarking reveals that national leaders and some of JCPL's peer group utilize volunteers to accelerate critical initiatives

### Benefits and Impact

- System-wide coordination will yield consistency and maximize impact of partnerships
- Rationalizing existing partnerships will reduce the number of under-performing partnerships while providing opportunity to grow high-impact relationships and maximize shared community outcomes

1: This manager should consider inventorying and evaluating existing partnerships to determine strategic fit as well as identify gaps and opportunities. And, the manager may wish to create tools and structures to better support partnerships, outreach and volunteer utilization at every level.

## 7. Add a Safety and Security function to address increased numbers of incidents and staff concerns

### Situation and Issues

- Focus groups cited a number of concerns regarding safety and security related to an increasing number of incidents particularly at Belmar and Arvada locations
- Incidents are handled inconsistently and staff report insufficient training to deal with the volume and type of incidents
- The effects of incidents may linger after the incident is over

### Proposed Actions

- 7a: Add a Security Manager<sup>1</sup> to the Facilities Division to oversee Safety and Security and coordinate system-wide training as well as to provide a more-consistent interface to the community and law enforcement
- 7b: Create a formal incident monitoring system to refine Security support as incidents ebb and flow
- 7c: Provide staff training on the JCPL Code of Conduct, de-escalation techniques and dealing with difficult patrons

### Rationale

- A number of peer libraries are responding to increased security needs by adding additional in-house or contract security resources

### Benefits and Impact

- Improved staff and patron safety
- Reducing the number and severity of incidents enables staff to focus on service delivery

1: This manager should also evaluate technology enhancements aimed at increasing safety and security.

## 8. Increase staff development and training functions and centralize these under ERD

### Situation and Issues

- Budget constraints caused JCPL to remove and/or reduce employee training and development functions
- The single resource dedicated to PS training is unable to meet the existing demand
- A JCPL Strategic Goal is to attract, develop and retain highly qualified staff and we need additional resources to do this well
- With half of JCPL's employees at or approaching retirement age, recruiting, training, developing and retaining people will be critical
- Changing demographics and increasing number of incidents requires professional MSW training and support for both staff and patrons

### Proposed Actions

- 8a: Add a Training Manager and Coordinator to ERD staff to develop and support a formal training program for various staff levels<sup>1</sup>
- 8b: Utilize Library staff to teach selected specific training modules
- 8c: Add Masters of Social Work (MSW) Support Specialist to provide patron services, training and support for staff in dealing with patrons in need
- 8d: Take advantage of technology such as a Learning Management System (LMS) to enable some self-service training modules

### Rationale

- Four of six (4 of 6) benchmarking peers align specific responsibilities for training and development within the HR function
- HR currently coordinates all non-public services staff training and externally-sourced training
- The “Big Idea” survey NPS score of 20 indicates strong support for enhanced staff development and training

### Benefits and Impact

- Improved efficiency, quality and consistency of training by virtue of alignment across JCPL
- Engaging Library staff as on-the-job trainers maximizes return on existing institutional knowledge base (reduced expenditure)

1: PX and Ops supervisors should continue to provide on-the-job training for new employees and the “Floater” pool described in recommendation 4 will provide additional training resource.

## 9. Add specific support functions (Communications, Finance, Facilities, ERD and IT) to support the planned growth in staff and facilities

### Situation and Issues

- JCPL is beginning a period of growth as a result of the increased mill levy expressing voter confidence and expectations
- Increases in revenues and expenditures, facilities and staffing require additional resources from JCPL Support staff
- Ongoing construction and remodeling requires increased support from the facilities team
- Patron demand for technology support and new technologies are placing increasing demands on the IT team
- Expansion activities require additional finance, recruitment, facilities, marketing, and graphics support

### Rationale

- JCPL's growth of facilities, staffing and increased patron demand for services requires additional support resources

### Proposed Actions

**9a:** Increase support departments' specific staffing levels as outlined in the next section of this report, which includes:

- Providing a home for the Strategic Planning coordination function in the new Finance Director's role
- Adding a construction support and facilities staff to accommodate expansions
- Filling an existing gap by creating Patron Tech support roles to enhance technology training and support
- Increasing resources for accounting and contracting
- Adding capacity in graphics, production and marketing
- Increasing resources to support recruitment

### Benefits and Impact

- Enhanced ability to attract, develop and retain new staff successfully
- Improved services to meet patron demand
- Improved ability to grow and maintain JCPL facilities and technology infrastructure
- Successful implementation of longer term facilities plans

## 10. Engage in succession planning and employee development to set up JCPL for future success

### Situation and Issues

- Approximately half of JCPL's current employees are Baby Boom or Traditional generation members, indicating a need to prepare for a sustained pattern of retirements
- Several members of the SMT, CMT and Library Managers are in this group
- JCPL's current organization structure is adequate for the near term by adjusting staffing levels and implementing recommended changes, but the opportunity exists to re-evaluate organization structure as SMT members retire or depart

### Proposed Actions

- 10a: Establish a succession plan by identifying a cadre of future leaders and providing coaching, mentoring and training support
- 10b: Develop options for consolidation and realignment that could be exercised in the event of an SMT retirement

### Rationale

- While specific departures are not known, age and length-of-service data indicate a significant issue could arise in the next 5 years
- Centralized decision-making associated with limited resources necessitate limited a coordinated effort to develop future leaders

### Benefits and Impact

- Near term retirements present an opportunity for advancement for high potential future leaders
- Solid succession planning provides assurance that JCPL will be able to perform as expected during the upcoming retirement wave