



Jessica Vega Pederson
Multnomah County Chair

501 SE Hawthorne Blvd., Suite 600
Portland, Oregon 97214
Phone: (503) 988-3308
Email: mult.chair@multco.us

December 4, 2023

Nicole Dewees, MBA, CIA
Multnomah County Auditor's Office
501 SE Hawthorne Blvd., Room 601
Portland, OR 97214

Dear Audit Director Dewees,

We have reviewed the library performance audit and welcome this opportunity to acknowledge, reflect, and take action on the recommendations included therein.

As noted in the audit document, more than three years have passed since the 2020 Employee Experiences During the Pandemic Survey. It's clear that the library's decisions and actions during the early part of the pandemic have had lasting effects on employees' feelings, confidence in leadership and morale. The resulting disruptions, due in large part to contract-mandated bumping and reassignments—but also the formation of new work teams and a larger public services reorganization—were impactful and difficult for many library workers.

The audit also notes the widespread impacts of an unprecedented and ambitious voter-approved effort to build, expand and modernize library spaces. Ultimately this work will allow the library to better serve its community in new ways, but its timing and scope contribute to overall disruptive conditions and impacts morale.

At the same time, public service roles have become more difficult everywhere we look: from other county services like public health, to retail to public education. Myriad factors contribute to this, including the housing crisis and systemic issues of inadequate behavioral health and substance use resources. These conditions affect public libraries all over, particularly ones in urban settings with similar community needs.

Prior to the pandemic and continuing today, library leadership is leading a yearslong effort to advance its service model to account for changing demographics, emerging technologies and evolving patron needs. This is arguably the most transformative period in the 159-year history of Multnomah County Library.

These factors converge to create a challenging and dynamic set of circumstances to address simultaneously. During my time as District 3 Commissioner and now, as Multnomah County Chair, I have been in conversation with library leadership about these challenges and the library's effort to respond and improve. I know there are thoughtful and meaningful changes happening, but solutions to complex problems take time, concerted effort and resources. I am grateful for the opportunity to share some facts and details about the library's work and future direction to address the issues raised in this audit.

I also want to acknowledge the real and serious concerns about safety expressed by library employees, the desire they expressed for improved communication about security issues and decision making, overall workload issues, and clearer direction, particularly around culturally-specific roles.

The library and its county partners are taking action. Together, the actions and changes the library is working toward represent a security model that brings a variety of resources and expertise to meet complex challenges, while continuing to center equity and underserved communities.

Over a long period of time, the library has made a series of conscious decisions to focus on serving the people and communities experiencing the most barriers and shifting services and resources to support those priorities. All of this can be disruptive and uncomfortable.

It's worth noting the substantial amount of effort and resources the library has already committed to safety and security. Some of the proactive measures to highlight include:

Training

- Ongoing staff training, including general safety awareness and extensive Person in Charge (PIC) training
- Trauma-informed critical incident response training
- Equity training for contracted security personnel
- Creating and hiring a position focused specifically on security training

Staffing

- Annual increases of budgeted security resources (FY 2024 budgeted security spending at \$3.5M reflects a 70% increase since FY 19)
- Future Staffing model (detail below)
- Creating new Safety Coordinator positions
- Resources to engage with vulnerable populations (e.g. a new Houseless Services Coordinator position, social workers with increased hours)

Facilities changes

- Creating fewer hidden areas and improving sightlines in existing library locations
- New building design: lower stack heights, better sightlines
- Security cameras: Adding new cameras, replacement of older cameras

External security consulting and research

- Completed independent security assessment for each new building
- Completed independent security assessment for Central Library
- Library Safety and Security Literature Review

Processes

- Extensive procedures and guidelines for responding to specific types of security incidents
- Multnomah County Workplace Security support
- An Executive Management Team (EMT) PIC model for critical 24/7 incident response and support
- Equity-focused resources, including a comprehensive equity rules review and a Protected Identities Decompression Space; staff and managers of color groups
- Communication protocols for critical incidents

The library and the Office of the Multnomah County Chair welcome the following recommendations. Our responses and additional information are included. We agree that further steps and resources will complement the actions the library has already undertaken. We are committed to a course of continuous improvement and we look forward to revisiting the recommendations and the library's progress toward implementing them in future conversations before the Board of County Commissioners.

Recommendation 1

Implement corrective actions and processes to ensure safety committees are meeting OSHA standards and champion them as a place to address security issues.

The library has implemented this recommendation as outlined. We appreciate that you identified gaps in compliance. As detailed in documentation provided as part of this audit process, the library worked to resolve these issues with corrective action earlier this year when they were identified during the audit process.

As part of this work, the library created clearer lines of accountability to Regional Managers by restructuring meetings and providing Risk Management training, and it is formalizing a Safety Committee Coordination Team to help ensure compliance and standardization of practice. This group will include library staff from Facilities, Learning and Organizational Development, Security, and the Regional Managers group. As of October 2023, the library is now holding monthly safety committee meetings and is committed to better recordkeeping and better compliance with requirements.

The library has a history of good, immediate and continuous compliance with OSHA guidelines and mandates. Across library operations, the organization responded to changing guidelines very nimbly during the onset of the pandemic. Library services and phased reopenings were based on OSHA and county mandates and guidelines, which shifted over time around factors like social distancing, occupancy limits, masking, HVAC requirements and service freezes during surges and new variants.

As discussed elsewhere in this response, the library has a wide range of other proactive mechanisms and actions to address security issues that extend well beyond the scope of safety committees.

Recommendation 2

Coordinate with the County Security Program to complete a Workplace Violence Threat Assessment and Workplace Violence Prevention Plan and communicate the results to all employees.

The library will implement this recommendation as outlined. The library will coordinate with Multnomah County Workplace Security, the lead organizational unit for security leadership, to fulfill this action as required by OSHA and communicate the results to all library employees.

Recommendation 3

Create a plan for continuous evaluation of the safety and security program, including:

- *Evaluating security-related trainings, informed by staff feedback.*
- *Developing a process to ensure all public facing staff have taken trainings and get refreshers.*
- *Implementing an incident reporting process that includes data analysis of trends and identifying and documenting corrective actions.*

The library will implement this recommendation as outlined. We agree that security is and should be a top priority for the library, as evidenced by the focus of this audit and the library's significant ongoing investments. The library's security program is constantly evolving and has been for more than a decade.

The library strives to take a holistic approach to that work, including direct staffing for person-in-charge (PIC) and security roles, infrastructure to support those workers and the program (PIC coordinator and security coordinator roles, in particular), robust training, change management support, trauma-informed practices and social workers.

We agree that the library should seek ways to better analyze data and trends, both within current limitations and beyond, which relies on additional technology tools.

Currently, the Library Security Analyst runs reports and analyzes trends. This analysis identifies areas in which more training is needed. The Library Security Analyst reviews findings each month, sharing data and making recommendations for future training to the Director of Location Services, who then coordinates with the Safety and Security Trainer and the Manager of Learning and Organizational Development to implement recommendations.

Training is a key component of furthering the library's security efforts. Staff feedback is a vital mechanism to inform that work and the library solicits staff feedback for each training. The library strives to increase and improve its security-focused training. The library created a limited duration position in FY 24 to lead security training and will seek to make that a permanent role as part of the FY 25 budgeting process. The library implemented a mandatory basic safety awareness training just this year and an annual refresher training will follow. Other safety and security training includes PIC training, Crisis Prevention Institute de-escalation and non-violent crisis intervention training, and mental health de-escalation training.

Online learning components include trauma-informed practices, child abuse reporting, exterior safety, incident reporting, microaggressions, library rules training, and more.

The audit touches on some of the serious limitations in existing technology tools. The current, homegrown incident reporting system allows some extraction and trend analysis, but the library's needs exceed the limitations of this system (e.g. the audit refers to individual "security incidents" but quantifies the number of separate rule violations within an incident as different incidents, when often they are concurrent). The new countywide Origami system includes other functionality, but does not meet the library's full reporting and analysis needs, requiring a separate software procurement for this specific purpose.

A new incident reporting process using new software is dependent on the county procurement and contracting process. A sourcing event (an initial phase) for a new library system took place in September. The procurement process itself will likely last into 2024 based on contracting procedural requirements within Multnomah County.

Recommendation 4

Revise post-incident protocols to provide more detail, particularly around supporting staff and debriefing, providing guidance on serious but not "critical" incidents, as well as allowing more decision-making at the neighborhood library level.

The library requests clarification in order to implement this recommendation. We know that library employees deal with a wide range of difficult and trying situations, including many that are serious, impactful and frightening, that might not meet the criteria of a "critical incident." In communications with audit staff, the library expressed that more clarity would be helpful to implement this recommendation, particularly a definition of "serious incident" as compared to the established definition of a critical incident.

The library has numerous robust protocols already in place, as outlined in the Critical Incident Response Procedures, the Person in Charge (PIC) manual and elsewhere. This recommendation does not detail what new protocols might better serve library staff or which existing protocols are unclear. The library will seek to gain more understanding as recommended in this audit to help inform improvements in post-incident protocols.

If a serious incident does occur, the library uses an array of approaches and steps to support library staff. These include post-event discussions and debriefs, on-site leadership support and creating intentional spaces post-incident that focus on employee support and well-being, in addition to sharing resources like the Employee Assistance Program. The library recognizes that it can make improvements to ensure these resources are consistently provided and that all library staff are aware of the procedures for seeking support.

Typically, debriefs include Regional Managers, the Security Manager, and members of the library's Executive Management Team on site as soon as possible following a critical incident (the process varies based on staff preferences and input relative to each situation).

Further discussions and debriefs also happen during location huddles, and in security meetings to capture lessons learned, to determine if changes are needed in protocols or if additional training is needed.

It remains unclear what types of decision making is recommended to occur at the library location level. Library leaders work closely with the COO and Chair's Office to consider appropriate responses to a wide range of difficult incidents. These may include closure or moving to door service, allowing the use of administrative leave, or assigning additional security, PIC or other staffing support. The library's overall mandate is to keep public locations open to community needs whenever possible. While an incident is unfolding or has just happened, the library asks for and uses the feedback of location leaders and staff to consider next steps.

Often, library leadership will pursue the recommendation of those directly involved with the incident, but other factors may influence decisions. It's not always appropriate to involve staff or middle managers at all decision-making levels. It's important that the library remains clear and transparent. Management will not be able to ask for or act on staff input in the moment for every situation.

This audit touches on some of the many ways the library works to incorporate the desires and input of library staff. These include engagement and collaboration with AFSCME Local 88, numerous joint task forces and workgroups to explore and refine processes and support around incidents and exclusion processes, workload, roles and responsibilities, staffing models and more.

Significantly, the library and Local 88 have reached an agreement that allows represented staff to opt in (or out) of the PIC assignment—with expedited processes related to safety and traumatic experiences—and provides a 15% pay premium. We welcome feedback and specific recommendations on what other supports the library could offer to support staff through and after difficult incidents.

Recommendation 5

Communicate to all staff after serious incidents and communicate summaries of incidents and trends.

The library requests clarification in order to implement this recommendation. Library protocols define "critical" incidents but not "serious" incidents. As discussed and shared throughout the development of this audit, the library maintains a set of [Critical Incident Response Procedures](#).

These procedures clearly define a critical incident; direct when to contact law enforcement or other first responders; provide direction for when and how to follow up with staff and patrons who are directly involved; and provide immediate direction for how to engage the library's Safety and Security Manager, resource counselors, the Executive Management Team Person in Charge (EMT PIC) and Facilities Dispatch. The procedures outline roles and responsibilities for the Safety and Security Manager and the EMT PIC.

They also guide post-incident actions like mobilizing a Management Response Team, dealing with medical issues; patron exclusions; potential library closures; use of administrative leave; release of records to law enforcement; media inquiries and numerous follow up actions with stakeholders.

We respectfully request assistance from the Auditors in defining what types of incidents would fall under “serious” to develop appropriate procedures. In addition, we hold concerns about whether communication to all staff after every serious incident is a trauma-informed approach.

The library uses a range of trauma-informed practices to guide communication around incidents. These include sharing incident reports with targeted audiences by location, PIC role and nature of the incident, with important and clear trigger warnings for incident reports that include disturbing/abusive language, threatening behavior, violence, and/or sexual misconduct.

As described below, the library relies on the experience and expertise of dedicated staff roles in internal communications, change management and security to guide mass communication of serious and critical incidents to the nearly 600 library staff members, many of whom do not work in public locations.

The library is currently discussing communication about critical incidents with the Workplace Security Team as well as Local 88 leadership through the Executive Security Team, a labor management team that includes members of library leadership, the Library Security Manager and Local 88 lead stewards.

We are committed to further discussing this recommendation and improving information sharing around incidents and trends that will benefit staff safety, wellbeing and security.

Recommendation 6

Communicate the vision for outreach and engagement to all staff, including expectations on community outreach for staff working in neighborhood libraries.

The library will implement this recommendation as outlined. The library is committed to ensuring all library staff understand the vision for outreach and engagement as well as expectations for community outreach for staff working in neighborhood libraries. Library leadership will address aspects of this recommendation as part of a planned assessment of the language and cultural KSA program defined in [its strategic plan](#) as well as through our Future Staffing project described later in these recommendations.

While the library recognizes opportunities for improvements, there are a number of existing, documented definitions, procedures, roles and expectations for engagement and outreach that guide this work currently.

Within the library’s staffing structure, community engagement is principally led by a centralized Community Services team.

There are opportunities for location-based staff to engage with this work or even lead portions of it, if individual location business needs allow and if a specific employee's position description includes this type of work. Expectations for outreach by percentage of time is spelled out in each of these position descriptions. The current state of bond-related closures and temporary reassignments makes sustained location-based outreach work more challenging right now.

The Community Services workgroup also serves as the lead and main staff for community engagement and community-based library services (such as schools, transitional housing, etc.). The library has adopted a set of clear definitions for community engagement, community library services, community outreach and a set of related functions, including awareness, networking, marketing and more.

The library's outreach goal is to raise awareness of library services and activities, including programs and resources, with a priority focus on communities who historically have been marginalized or underserved by the library. Often this work is requested of location-based staff by community members or partners because of existing relationships and in-person requests. The library needs to balance and prioritize these requests based on other location-based needs, reach or impact, and other outreach activities.

The library's community engagement goal is to create active partnerships and relationships that intentionally invest in community power and capacity building so that the library can understand the barriers people face in accessing library resources and knowledge. The library is currently building capacity in this area with a variety of supports including hiring temporary Program Specialist Seniors, with cultural or language KSA designations. These staff members will utilize their subject matter expertise and leadership role to engage other library staff in this work.

The library's community library service goal is to deliver services to populations subjected to marginalization and underserved communities of culture and color, with the understanding that serving people where they are reduces barriers to library services. While some teams within Community Services have operations with needs-based metrics, others have not and the library has been working in FY 24 to consistently center race and equity in community library service.

More generally, the library is implementing systems to shift toward equity guiding systemwide decision making. Equity frameworks and tools, including an equitable program scoring sheet; an equity impact review sheet; project management equity tools; a systemwide project prioritization tool; workbooks; equity lens tools; a mandatory equity training for all staff; groups and spaces and meetings that center the voices and experiences of staff and managers of color and more inform many of the library's outreach efforts and help prioritize staff time for outreach.

Recommendation 7

Identify and document upcoming changes that will affect employees, which could benefit from focused internal communications.

- *For each change identified, implement a communications strategy that identifies multiple methods of communication, involves an element of staff input, and explains the reasons behind changes.*

The library is already implementing this recommendation as outlined. Multnomah County Library is a high-demand organization for information and its leadership has made ongoing changes to meet those demands in new ways. The library works hard to keep employees apprised on systemwide initiatives, especially around the most impactful ones, including evolving models for staffing, security and patron service.

A detailed systemwide internal communications plan guides this work and articulates roles, timing and desired outcomes. Individual communications plans support specific initiatives. The library will review upcoming changes to ensure that it has plans in place or that plans are developed to ensure effective internal communications that fulfill this recommendation. The library uses staff feedback when appropriate and as part of a plan in which it can be effectively utilized and leadership will explore other ways to do this. Staff engagement is a planned component of the upcoming Language and Cultural KSA Assessment, the Future Staffing for Future Spaces effort and the Employee Satisfaction Improvement Team. Library leadership welcomes additional input or best practices that will further support or enhance these efforts.

Multnomah County Library was the first county department to create a position dedicated to internal communications, beginning in FY 2016. Since then, the library has added structure and focus to help employees understand and navigate changes to library services, tools and processes. These include a robust change management work unit within Learning and Organizational Development, enhanced training, and project management coordination and leadership within the Office of Project Management and Evaluation.

Currently, internal communications take a number of different forms to support different communication styles, roles and needs. These include:

- Email: A high volume of written information to share upcoming changes and developments, with subject lines that delineate whether action is needed, whether an item is informational only, etc.
- Library commons: a dynamic intranet that provides links to information that has been shared by email and where staff can seek out resources and information, or post information to share with colleagues
- Huddle notes: A weekly round-up of brief updates that have been previously distributed in different formats for recap and discussion at in-person huddle meetings (also distributed in writing to all library staff)
- The Download: A recurring Google Meet event with rotating topics and subject matter experts to present and answer staff questions about major initiatives and changes of systemwide interest
- Talking points and FAQs for staff to inform and aid in direct communications with patrons
- HR Connection newsletter: A weekly compendium of news, tips, reminders, resources, job openings and celebration of staff accomplishments
- Surveys and forms to gather staff input and preferences to support information sharing

- Manager previews and input: Sending advance drafts of written communication to familiarize managers beforehand and help them prepare for staff questions (this also can lead to feedback to improve message content) and monthly informational updates or discussion in manager meetings to address key changes
- Open access to schedule one-on-one in person coffee conversations between EMT members and any library staff member
- Project and communications planning that builds in time for change management and project management support and resources

Recommendation 8

Develop and communicate a plan for the leadership team to regularly spend time onsite in neighborhood libraries.

The library will implement this recommendation as outlined. Executive Management Team members do this on an ad hoc and individual basis, but we appreciate the recommendation to add structure and regular frequency. Based on this recommendation, the library will formalize this effort for all executive team members. In addition to onsite visits to library locations, the leadership team will also plan to visit workgroups that do not work in public locations.

I would like to note that the bond-related efforts and the 24/7 EMT PIC role place a high demand on each member of the Executive Management Team's workload and availability, in addition to their other executive responsibilities. Having said that, the library understands the importance of direct staff engagement and is committed to improving EMT member presence at library locations.

Recommendation 9

Develop a staffing plan for when all construction is complete. In line with the findings in this audit, the staffing plan should solicit employee input during development and address:

- *Security, examining staffing for security and social work personnel including coverage on evenings and weekends*
- *Adapting the person-in-charge model to meet union agreements.*
- *Staffing for neighborhood libraries, so they stay open.*
- *Community engagement, so programs, outreach, events and engagement can increase, while addressing employee concerns around workload and opportunities.*
- *Cultural and language skill allocation by position and location.*
- *Allowing time to hire for hard to fill positions.*

The library is already implementing most aspects of this recommendation. For the cultural and language skill allocation by position and location, the library will produce an interim approach by October 2024 but this plan will evolve as the library continues efforts to assess community needs for cultural and language specific services.

The library requests clarification on the recommendation to increase programs, events, outreach and engagement. Is the recommendation to increase all of these activities?

If so, what is the baseline data used by the Auditors to measure current levels of outreach and engagement? And, can the Auditors please define which activities or services are included in the term “outreach”?

While the library is already working on increasing programs, events and engagement, the library asserts that simply increasing outreach activities for which outcomes are unknown is unadvisable. The library’s Future Staffing Initiative underway is designed to help the library assess staffing resources required for all services. Before committing to increase outreach activities, the library must complete the future staffing planning in order to ensure adequate staffing for services the library has already committed to providing in new and expanded library spaces, which includes ensuring adequate security and safety staffing. This work is happening now as part of the Future Staffing Initiative, which is described below.

The library is committed to staffing libraries to serve the community effectively after construction has been completed. This relies on adequate numbers of staff, but also on new community-centered models and different kinds of service than past buildings would allow.

Multnomah County Library has been working to evolve its staffing model for many years to account for changing business needs. Those needs include profound changes in technology and information access, security resources, person-in-charge staffing, social workers, culturally specific outreach, materials movement and a host of support resources like training, change management, project management and more.

This work formally began in 2019 with the Future Staffing Model Team, a joint team of managers and staff, which culminated in a set of recommendations that the library is implementing now. The library’s Future Staffing initiative builds on work being done by library leadership, library managers, staff groups (including culturally specific services), Local 88 leadership and HR partners to align staffing and workflows across the organization.

In many ways, these are complex and detailed internal changes that can be difficult to communicate to staff who are busy with day-to-day location work, and to the public at large. Efforts to ensure appropriate future staffing include the Staffing Model Actualization Team and the Future Staffing Initiative. The library will begin additional staff-focused engagement components of this work in 2024.

The library is in the midst of a procurement process to engage with an Organizational Development firm with racial equity expertise to work with the Library to develop the Future Staffing plan. This process will involve staff engagement, including Local 88 involvement, and a broad assessment of future staffing needs, workflows, team structures, decision making roles, and service assessment. The implementation plan is expected to be completed in the Fall of 2024 in time for the FY 26 budget submission.

In addition, library leadership and Local 88 have reached an agreement on an opt-in PIC model that allows staff to opt in (or out) of the PIC assignment—with expedited processes related to safety and traumatic experiences—and provides a 15% hourly pay premium (note: these are all terms explicitly requested by staff members, agreed to as proposed by management).

The Library Events and Readers Services team is among the work units most deeply affected by the pandemic. Staff and management within this group has turned over completely from prior to the pandemic. Due to this attrition (including a loss of institutional knowledge), changes in community needs around programming, and ongoing library closures, the library is not providing programming at pre-pandemic levels.

Leadership has worked to rebuild both centralized programming and location-based programming and the The Library Events team is completing its staffing with a renewed focus on culturally relevant programming that will complement future library spaces. The library expects both of these functions to resume with new library spaces.

Additionally, the library has created a team of staff to design and implement new services for creative learning and programming, including makerspaces, audio/visual focused spaces and other new amenities that will be possible in new spaces. This team includes program specialists (including Black Library Cultural Advocates and Spanish language KSA roles and non KSA roles), a librarian, and a supervisor. In January 2024, Community Services will convene a summit, led by Learning and Organizational Development in which the scope and vision will be clearly identified for this work. Furthermore, a newly-hired Community Partnerships manager will be pivotal to engage community members and partners to provide and extend creative learning opportunities once new locations begin to open.

The library is also beginning a Language and Cultural KSA assessment initiative, which is part of the strategic plan. This work will establish goals and standards for defining service languages and cultures and assignment of language and cultural KSAs; clarify daily work expectations of staff with language and cultural KSAs; and ensure staff are supported in their language and cultural work.

A limited-duration position will lead this effort in coordination with staff and managers, with additional support and expertise provided by Learning and Organizational Development, the Equity Team, the Office of Project Management and Evaluation and others. The position will work with a project team that will include staff from each language and cultural KSA team. Soon, the library will finalize the recruitment process for this position, draft the project charter and solicit project team members.

Recommendation 10

Communicate the staffing plan to Library employees and present it to the Board of County Commissioners both before all buildings fully reopen and after reopening. Request budget changes as needed to support the staffing plan.

- *Initial communication to staff and Board should occur by October 1, 2024. Follow up communication should occur by October 1, 2026.*

The library will implement this recommendation as outlined. The library will complete these actions as recommended. As indicated above, the Future Staffing plan is scheduled to be completed by October 2024 in time for the FY 26 budget submission.

Thank you for the opportunity to provide a response to this audit.

Sincerely,

A handwritten signature in black ink that reads "Jessica Vega Pederson". The signature is written in a cursive, flowing style.

Jessica Vega Pederson
Multnomah County Chair