About OrangeBoy

Inspired by a little orange cat named Opie, OrangeBoy Founder Clark Swanson set out to tackle challenging business problems by studying consumer behavior. Opie's colorful character and desire to stand out, be bold and see things differently became the OrangeBoy motto: Think in Color.

For more than 20 years, OrangeBoy has been helping clients Think in Color, offering a unique perspective to approach business problems by putting themselves in their customers' shoes, using data and insights to drive decisions and measure impact.

Our History & Services

OrangeBoy began as a fundraising consultancy applying donor analytics to formulate and execute strategy, and then evolved into a strategic planning and customer segmentation company for social service and government-related entities. Today, OrangeBoy offers Savannah, a software as a service (SaaS) business intelligence platform designed to help libraries report customer insights in real-time. This tool is also equipped with reports, GIS mapping, customer feedback and direct targeted messaging capabilities.

Savannah is offered as a web-based tool. Combined with OrangeBoy's other qualitative and quantitative research methods and consulting services, clients receive expertise to translate trends, develop strategies, create strategic plans, allocate resources or implement marketing or branding initiatives. Our business and customer intelligence solutions have been applied in hundreds of public library engagements.

Our Methodology

Our approach is both an art and a science, using an analytical focus blended with expertise from the library sector, as well as retail, financial services, health and human services, government, and cultural institutions.

Specific to Savannah, libraries gain deep insights about their customers based on the customers' use of the organization's services. Savannah achieves proprietary segmentation, reporting and other insights

by correlating patterns of usage from the library's various service lines, including computer usage, Wi-Fi usage and digital usage. These insights and information can then also be paired with other research methods to provide insights, context and comparative information for prioritizing services and decision-making.

Presentation Overview

The following topics will be discussed as part of the meeting held on May 11, 2017.

- **Introductions.** A brief introduction to OrangeBoy, our service, philosophy and methodology.
- **Library Industry Trends.** Discuss library industry trends and how Jefferson County Public Library (JCPL) compares to OrangeBoy's Savannah community of libraries, applying proprietary industry metrics.
- **Market Assessment Findings.** Present highlights from the key findings from the marketing opportunity assessment, discussing key demographic and growth trends in the library's service area.
- **Key Community Findings and Opportunities**. Highlights from the intercept surveys, observational study and community stakeholder interviews.
- **User and Non-User Key Findings and Opportunities.** Key insights from a customer and non-user survey about library use, as well as introduction to customer segmentation and key insights.

Jefferson County Public Library Edge Initiative and Impact Survey Findings

Jefferson County Public Library, like libraries across the country, is moving from reporting inputs and outputs to reporting outcomes and impacts. Currently JCPL tracks various quantitative and qualitative measures to assess use of, demand for, and quality of library services. Quantitative measures we collect are defined by the state and other reporting agencies. These measures include service metrics, such as circulation, hours, visitors, programs, and attendance as well as financial metrics such as revenues, expenditures and staffing. We also evaluate qualitative use of library services with tools such as our customer satisfaction survey, program attendee surveys, computer class evaluations and patron comment cards.

As the library field as a whole continues to incorporate outcomes and impacts into its evaluative methods, several evaluation tools have been developed specifically for libraries. These tools have been developed on a national level by experts in the field. Edge Initiative and Impact Survey are two evaluation tools that each measure slightly different concepts of library technology services. Each can be used independently, but when both are implemented the library has a richer and more detailed picture of its services and its community. The use of both allows for validation of data across multiple sources and creates the opportunity for JCPL to benchmark our services against other libraries that report information. This summary reports the findings of both the Edge Initiative completed in December of 2016 and the Impact Survey completed in February of 2017.

The Edge Initiative survey is completed by staff of the library to identify technology offerings so they can be benchmarked against other public libraries to help identify areas for increased focus. The Impact Survey seeks community input regarding technology use and purpose in the library. Together, these tools allow us to gain a better picture of areas for technology improvements and how those improvements may affect our patrons.

Findings from the two resources have both led to and validated strategic goals for 2017 including; providing a collection of online links to local, state, and federal eGovernment resources to support the use of public technology for this type of resource, providing online guides and instruction, and implementing photo editing software for patron use. The findings will continue to inform 2018 planning and projects including; expanding software to include audio-video recording and editing

capability, and assessment of community needs for technology resources for people with disabilities.

Edge Initiative Results

Led by the Urban Libraries Council, the Edge Initiative was developed by a national coalition of leading library and local government organizations and funded by the Bill and Melinda Gates Foundation. Edge is a ground-breaking, first-of-its-kind management and leadership tool that helps libraries create a path for the continuous growth and development of public technology services. Through an easy-to-use suite of tools, Edge supports libraries in making strategic decisions and identifying areas for improvement. Since its national launch in 2014, Edge has gained wide adoption by the library field with nearly 30% of public libraries in the U.S. registering for an Edge account and 20% of the nation's public libraries completing the Assessment portion of the Edge Toolkit.

The Edge Initiative survey is completed by staff of the library to identify technology offerings, benchmark results against other public libraries, and use the data to identify areas for increased focus. The Edge survey was completed by JCPL staff in December 2016. JCPL received three reports from the survey: a Peer Comparisons Report, an Assessment Results Report, and a Recommendations Report.

Peer Comparisons

The Edge Initiative allows us to assess how we compare to our peer group, i.e., libraries that serve populations of over 300,000 that have completed an Edge survey. This is a representative sample of 455 libraries. Out of a possible 1,000 points, JCPL scored 705 in December 2016. Libraries in our peer group of "Very Large" scored within a range of 435-845. A perfect score of 1,000 is not expected. Rather, the score allows us to identify improvement opportunities, as well as for alignment with our strategic goals. The assessment, peer comparisons, and recommendations are used to develop a framework for meeting those goals.

Table 1 shows JCPL scores for each strategic area of the Edge Survey completed in December 2016 compared to the average scores of our peers.

Strategic Area	Benchmark	JCPL Score/Total Score	Average Score
Community Value	1. Digital literacy	70/75	55
	2. Digital tools and resources	75/105	80
	3. Meeting key community needs	90/130	94
	Total	235/310	229/310
Engaging the Community	4. Strategy and evaluation	95/155	91
	5. Strategic partnerships	35/75	48
	6. Sharing best practices	55/65	41
	Total	185/295	180/295
Organizational Management	7. Planning and policies	45/50	39
	8. Staff expertise	70/80	63
	9. Devices and bandwidth	70/135	63
	10. Technology management	80/90	70
	11. Technology inclusiveness	20/40	20
	Total	285/395	255/395
	Overall	705/1000	664/1000

Table 1

Assessment

In addition to being able to benchmark against peers, Edge Initiative assigns one of three levels for resources and services.

- **Level 1 Attributes**-Considered foundational for all library types. These resources, activities, or programs are generally simple and low cost to implement.
- **Level 2 Attributes**-Generally applicable in most library communities, though a community needs assessment may reveal that some of these resources and services may not create as much value to the community as others.
- **Level 3 Attributes**-Generally more costly or difficult to implement but are at the forefront of innovative activities, resources, and services that will help put the library at the center of digital inclusion in the community.

Edge totals the percentage achieved in each of the assessment categories based on our scores in various resources and services. Similar to the benchmark scores, 100% achievement is not expected as the focus at each attribute level will vary based on community needs and strategic goals. Table 2 below indicates our achievement at each level:

	As of December 2016
Level 1 Attributes	73%
Level 2 Attributes	60%
Level 3 Attributes	20%

Table 2 – *Peer Comparison of percentage achieved not available.*

Recommendations

The last report from the survey results provides recommendations in areas where the library could achieve the next level of services within the Edge Assessment and areas where the library might begin to provide a particular service. JCPL's report included 52 recommendations.

The team involved in assessing the Edge and Impact data was comprised of cross-departmental staff, each with expertise in the ways in which technology is implemented and utilized in our libraries. This included staff from IT, Promotions and Marketing, and Public Services including both web experience and physical location representation. The team met and evaluated the

recommendations, identifying those that fit within our 2017 strategic plan, those that should be included in our 2018 strategic plan, and additional recommendations to include in long range planning. The team identified recommendations that were validated through the Impact Survey, resulting in 8 action items for 2017 and 10 for 2018.

The recommendations offered guidance for project planning, as well as confirmed the need of some projects already in progress. Three of the eight projects for 2017 have been completed, including: Performing a content inventory of the library's website at least annually, include questions about community technology in a library-sponsored needs assessment survey, and increase and manage bandwidth to optimize the speed of connection and improve the patron's internet experience. Other projects that are planned for in 2017 include: Offering photo editing software for public use, providing a collection of online links to local, state, and federal eGovernment resources to support the use of public technology for eGovernment services, provide online guides and instruction, increase wireless access points throughout public areas, provide presentation equipment for in-library public use, and monitor connectivity at the network level for all library locations.

Recommendations will be planned for and reassessed annually. Planning for 2018 includes 10 items including; expanding software to include audio/video recording and editing capabilities for patron use, conducting an assessment of community needs for technology resources in languages other than English to help gather feedback from diverse members of our community, conduct an assessment of community needs for technology resources for people with disabilities, establishing an annual survey regarding public technology use and outcomes for eGovernment resources, establishing an annual survey about public technology use and outcomes in education, providing technology devices in library spaces for community organization use, providing technology mentorship and establishing expectations around technology performance for library staff, and monitoring average wait times patrons experience for public computer use.
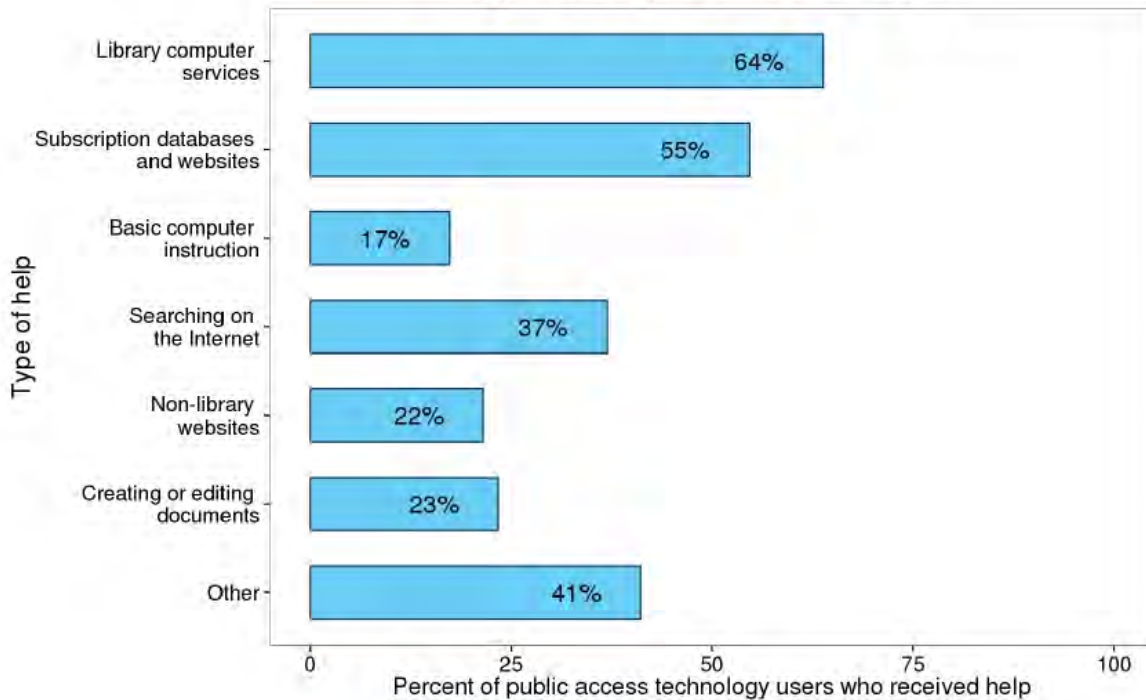
Impact Survey

Designed and validated by research staff at the University of Washington Information School, the Impact Survey is an online survey tool designed to quickly and easily provide library professionals with useful data on how their patrons use public technology resources and services. Impact Survey's objective is to

leverage community input regarding technology use to improve the technological services offered. The program saves libraries the time and costs associated with developing and reporting an in-house survey. Understanding our community is essential to providing patrons with the technology services they need. The Impact Survey asks patrons how they use library technology services such as; public computers, wireless networks, online resources, and digital literacy training. The survey explores outcome-oriented use around services in a variety of categories including: education, employment, entrepreneurship, health and wellness, e-government, civic engagement, e–commerce and social inclusion.

Survey Findings

The Impact Survey was available online to patrons for three weeks from January 17 to February 5. It was promoted on our website, at computer stations, and by staff in the libraries. In addition the link was emailed to dozens of community partners who promoted the survey and the link to their members via email and newsletters. The library received 1,142 responses. Of the respondents, many indicated they visit the library to use computers and the Internet, as well as receive technology-related help and training from a librarian or staff person (see figure below).

Types of Help Received From Staff

Type of help	Percent
Library computer services	64%
Subscription databases and websites	55%
Basic computer instruction	17%
Searching on the Internet	37%
Non-library websites	22%
Creating or editing documents	23%
Other	41%

Percent of public access technology users who received help

In addition to overall use of technology by type or activity, the survey gathers information about how patrons are using the technology and how the activities they're using it for impacts their lives. 87% of respondents indicated they have regular access to the internet somewhere other than the library, so determining the purpose of their use can help inform us in better serving our patrons.

The survey provides details about technology-related activities. Additional demographic data also informs us about our patrons and their technology use and needs. Discovering how we are connecting our patrons to information is helpful in guiding us to offering resources that support their objective for using the library. The survey results are also supportive in the selection of recommendations from the Edge Initiative. Below are some details pertaining to various motivations for using technology in the library.

Education

- 34% of public access technology users indicated they had used the public library's computers or wireless network for educational purposes. Of those users, 23% were between the ages of 14-24.

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- 58% of public access technology users reported having received one-on-one technology help from library staff or volunteers in the past 12 months.
- 46 users applied for degree or certificate program; of those, 31 were admitted to the program.
- 54 users took a school-related test online, 9 of which had a librarian serve as the test proctor.

Employment

- 33% of public access technology users at Jefferson County Public Library reported they had used these resources for employment or career purposes in the past 12 months.
- 33% of users looked for a job, and as a result 107 people got an interview and 77 people were hired.

Health and Wellness

- 29% of users at Jefferson County Public Library indicated they had used the library's computers or Internet for health or wellness purposes, such as finding health information and conducting health-related service transactions.
- 19% of JCPL users reported learning about diet or nutrition; of those, 18% reported making a change to their diet.
- 17% of users reported learning about exercise or fitness; of those, 16% reported making a change in their exercise habits

eGovernment

- 27% of users at Jefferson County Public Library used the library's computers and Internet connection for eGovernment purposes
- 143 accessed government forms and 64 indicated submitting those forms online at the library.
- 154 learned about government programs or services, and 60 applied for programs or services.
- 25 applied for a permit or license

Future Implementation

By continuing our use of the Edge Initiative and Impact Survey tools, we will be able to track our progress with these same assessment tools in 2018, drawing comparisons and monitoring changes in patron use alongside our technology improvements and additions. We expect that JCPL's Edge score for meeting key community needs will increase. We also hope to see increased awareness and usage of technology in our Impact Survey scores. These resources complement one another in exploring and validating our customers' changes in behaviors and use of our resources, allowing us to make more

informed decisions. We will continue to use these tools in an ongoing basis to track our progress

annually.

memorandum

TO: Pam Nissler

FROM: Sandie Coutts

DATE: May 2, 2017

RE: Organizational Analysis

We previously informed the Board of Trustees about our intention to contract with an outside consultant to conduct a thorough analysis of our organizational structure. The results of this analysis will identify opportunities to improve our organizational effectiveness in meeting our strategic and operational goals including:

- Recommendations about current and future staffing levels
- Recommendations about the alignment and distribution of essential functions

We sent out an RFP in early March and received six responses. After ranking those responses we selected three well qualified vendors to interview; those bids ranged from $65,500 for 3 months of services to $97,675 for 5 months. Government Performance Solutions Inc., Zilo International Group and Enso Professional Services were interviewed in April and the selection team unanimously decided that Government Performance Solutions Inc. was our number one choice.

The proposal submitted by GPS Inc. was competitively priced at $82,500 for 20 weeks of services. This project would bring a team of 4 local experts on board to conduct an organizational analysis. The GPS Inc. proposal stood out from the rest for several reasons:

- The depth of organizational analysis and change management expertise garnered over 4 years of working on similar projects with public sector/government entities in the State of Colorado.
- The collaborative approach that would involve employees at all levels while utilizing the expertise of our senior leadership team.
- The supportive services offered, which included coaching, training and communication around any recommended organizational changes.

We have received excellent references for GPS Inc. and a draft contract is currently under County Attorney review. I hope that we will be bringing a final contract to the May board meeting to seek trustee approval.

TO: LIBRARY BOARD OF TRUSTEES

FROM: JULIA HILL-NICHOLS, CHAIR

DATE: April 20, 2017

RE: PROPOSED 2018 GOVERNANCE BUDGET - POLICY 4.8.2

The Library Board will consciously invest in its ability to govern competently and wisely. Accordingly, costs will be prudently incurred, but sufficient to ensure the development and maintenance of superior governance, including funds sufficient for:

A. Library Board training, including publications and dues.
B. Library Board member travel/reimbursements to annually attend the Colorado Association of Libraries (CAL) annual conference, national conferences, and non-conference travel, as appropriate [1].
C. Auditing and other third party monitoring of organizational performance.
D. Surveys focus groups and opinion analysis (included in Communications budget).
E. Library Board-hosted ownership linkage/outreach events.
F. Library Board meeting and retreat costs.

Account Category	Account Number	Account Description	2018 Proposed 04-20-17
426000 - Supplies	426100	General Supplies	100
	426137	Office Supplies	100
	426183	Recognition/Appreciation	300
	426390	Food Supplies	50
433090– Professional Services	433090	Professional Services	1000
435600 – Dues, Meetings, Training	435625	Food/Beverages	5000
	435630	Professional Dues	750
	435635	Business Meals	1000
	435640	Training and Education	4000
	435660	Conferences and Trade Shows	2400
435800 – Travel	435850	Mileage	1500
	435860	County Travel	12800
		TOTAL	$29,000

State Conference: 7 @$350.00 – CAL, Oct. 12-14, = $2,450; National Conference(s): 5 @$2560.00 (PLA, Philadelphia, PA, March 20-24; NLLD, Washington DC, Spring 2018; ALA Midwinter, Denver, February 9-13, ALA Annual Conference, New Orleans, LA, June 21-26 = $12,800)

Membership Dues: PLA Trustee Annual Membership $62 each; CAL Trustee Membership $45 each.

memorandum

Jefferson County
PUBLIC LIBRARY

to: Pam Nissler, Executive Director

from: Julianne Rist, Director of Public Services

re: Columbine Shelving Recommendation

date: April 28, 2017

Background: A Request for Proposal (RFP) was released on April 4 asking for proposals for new shelving for the Columbine remodel. The proposal asked for three options of shelving, a base bid of standard components, a bid for custom slanted shelving on a "T" base, and a bid for custom slanted shelving on a standard base. These options allowed JCPL to compare the price differences between what was expected to the least expensive option of standard shelving to angled (or custom) shelving that would make it easier for the public to browse and see material.

RFP Results: Five companies responded to the RFP. Two of the options from two different vendors were out of our projected budget. All three options had multiple vendors who presented bids within our projected budget. Two vendors are being invited to set up sample sections of shelving on May 22. Staff will be able to evaluate the look and construction of the shelving and custom options specified. Once this demonstration is completed the committee will make a final selection and bring that recommendation back to the Board. We will be asking the Board to call a special meeting no later than June 1 to authorize the contract from the final selected vendor. This timeline will allow for onsite inspection of the actual product, and still have the appropriate lead time for delivery and installation.

Timeline:

- On site product demonstration will be held May 22
- Final option and vendor selection by May 25
- Recommendation to the Board of Trustees for authorization of contract approval June 1
- 8-10 week lead time for shelving order (June 6 – Aug 21 is 10 weeks)
- Delivery and installation of shelving for Columbine August 21 - September 1