

# Multnomah County Library District

## 2024-25 Hearing Minutes

Wednesday, May 29, 2024

10:40 a.m.

Multnomah Building 501 SE Hawthorne Blvd.  
Portland, Oregon

### **Present:**

#### **TSCC:**

Chair Harmony Quiroz, Commissioner Mark Wubbold, Commissioner Matt Donahue, Commissioner Tod Burton, Executive Director Allegra Willhite, and Budget Analyst Tunie Betschart

**Absent:** Commissioner Allison Lugo Knapp

#### **County Library:**

Staff: Deputy Director Annie Lewis and Director of Finance & Facilities Katie Shifley

Chair Quiroz welcomed everyone to the hearing and briefly described the duties and responsibilities of the TSCC. She reviewed the hearing process and stated the hearing was to engage the district leadership and provide an opportunity for the public to comment before Multnomah County Library District adopts its budget. She asked the TSCC Commissioners and staff to introduce themselves and state if they have business relationships with Multnomah County Library District that could be perceived as a conflict of interest. Each commissioner and staff member introduced themselves and said they had no conflict of interest with the county. She asked Multnomah County District representatives present to introduce themselves.

She asked if the library staff had any comments on the Library District's Approved Budget before the questions begin. Ms. Lewis said they valued the partnership with TSCC and recommended moving to public comment and the questions.

Chair Quiroz asked if anyone had signed up to give public comment. Executive Director Willhite reported that no citizens signed up to speak at this hearing, and no written comments were received, so Chair Quiroz began the TSCC questions.

### **TSCC questions:**

#### **Commissioner Tod Burton asked the following questions:**

In FY 25, the district anticipates reopening four libraries that are currently closed for major expansion or renovation. Are projects staying on time and on budget? Have you seen increasing material costs due to inflation and/or supply-chain shortages?

Ms. Katie Shifley said that was right. The County Library is expecting to welcome patrons back to Holgate, Midland, North Portland, and Albina over the next year and are excited about that. The library bond work is generally overseen by the two executive sponsors, the Library Director and the Director of County Assets. And there's a team of folks called the bond program management office or the PMO responsible for the day-to-day management of the bond program. The staff has coordinated with them on the responses since they're much closer to that day-to-day work than library staff. The overall bond program or PMO manages the bond budget at a portfolio level across all of the projects, with allocations for each project that can shift across the life of the bond. The PMO works with the county CFO to maximize each dollar spent throughout the program. This means the funds are strategically considered, and deciding when to increase a budget's responsibly

is focused on what will make the most sense for an excellent long-term investment. As you alluded to in your question, national and global risks related to the pandemic have led to historically unprecedented market volatility, including but certainly not limited to double-digit inflation, escalation, and supply chain commodity issues.

A good example is that it has taken between 50 and 80 weeks of lead time to get electrical switchgear, which has been a factor in some projects. Labor shortages and some changes in the insurance industry have affected the project timelines and overall project budget, which have been factored throughout each of the bond projects. The PMO has used the \$50.7 million bond premium reserve and savings from other projects. For example, the operations center came in on time and under budget, as well as other portfolio-level contingencies, to assess available funding and shift funding to cover unforeseen expenses, market conditions, inflation, and other project changes as the course of the bond work proceeds. Additions to an individual project budget allocation from the premium reserve, outside funds, or donor grants require approval from the county CFO's executive sponsors to change those project-level allocations within the project level.

The overall bond program schedule is approximately eight years ahead of the voter bond term. However, those risks associated with national and global market escalations, labor shortages, and supply chain issues created challenges. The technique used for the bond sale required that 85% of the tax-exempt bond dollars be spent within three years of the sale, compressing the overall bond schedule by two years. In response to bond spend-down requirements, the overall project schedules and the sequencing of construction activities aggressively pressured limited regional labor and material resources as the bond program emerged from the pandemic. Regarding individual projects, there have been some challenges in meeting the project deadlines set to achieve the bonding spend-down timelines. For example, supply chain issues like the electrical switchgear mentioned, delayed local permit review timelines, changing requirements for local utilities, and site-specific conditions like unforeseen soil conditions or required seismic upgrades have challenged individual project schedules. In short, yes, the district has seen challenges due to inflation, supply chain issues, and individual project budgets and timeline changes shift within the overall portfolio of the bond work. Still, at the portfolio level, the work is on track to be completed within the required timeline and the available resources.

Will the increased size of the facilities require additional employees at the libraries?

Ms. Lewis said the district will need additional staff in larger library locations. Not all locations will require additional staff, but some will. There are a lot of variables here, though. The district is rolling out automated materials handling across most locations to reduce manual labor, including a 65-bin Sort Center at the new operations center. Materials movement needs within library locations may not increase significantly, even with larger spaces.

In some locations, the district is adding significant community room space that can be activated through partnership models. Last year, the Library added a new Community Partnerships Manager position to develop and deepen the approach to inviting partners into library spaces. Because physical spaces have so hampered the district, they also have robust programming and outreach functions that can be brought to bear in these new, larger spaces.

The district is deep in the development of a Future Staffing Initiative project. They are reassessing current staffing levels, and they have hired an external consultant to support them as they work through the nuances of future staffing, discussing the FTE, job classifications, and workflows that will be needed as the system changes.

The bulk of that future staffing planning work will happen over this summer, and they envision taking a phased approach to shift staff resources over the next few years as they work backward from

East County Library's opening in fiscal year 2026. The Library will present detailed plans for future staffing to the Board of County Commissioners this year.

**Commissioner Matt Donahue asked the following questions:**

A 2023 audit found that "the library has struggled to respond to the changing safety and security landscape." Last year, we discussed the changes happening in many libraries nationwide, not just in Multnomah County. At that time, conversations were ongoing with county Behavioral Health Services about how they could bring their services to patrons. How are those plans progressing? Have you developed procedures or policies for connecting with or providing more behavioral health expertise in library spaces?

Ms. Shifley said safety and security continue to be a significant challenge and a core commitment for the library system, as is the case for almost every other urban library system in the country. What's happening in society in general is often reflected in the library system.

Making libraries as safe as possible continues to be a significant area of focus for the district. In addition to significantly expanding the resources geared toward security, which has been up 80% since FY 19, staff has continued to work with county partners to bring their expertise to bear.

Library leadership began meeting with Multnomah County Health Department's Behavioral Health team in February of this year to discuss how staff might collaborate to bring additional mental health support into the Library, particularly the introduction of peer support specialists. Denver Public Library employs a variation of this Peer Support Specialists program, which has positively supported patrons with high needs and need additional support.

Peer support specialists are individuals with lived experience with mental health diagnoses, substance abuse disorder, and homelessness who are in recovery and have completed specialized training to use their stories to establish valuable rapport, share everyday experiences, and strengthen engagement in care.

The Library Department proposed budget includes \$180,000 in Supportive Housing Services resources to establish 2.0 contracted peer support specialists. The Behavioral Health team has been instrumental in advising on this program, helping develop the scope of work, and supporting contract administration. The district expects this program to launch, primarily out of the Central Library, this summer, and the peer support specialists will work closely with the mental health professionals onsite to respond to behavioral health-related challenges to reduce escalations and disruptions. The district is so glad for the partnership and the support to bring outside expertise and resources to bear in the library system. They have received funding from the Library Foundation to support acquiring some equipment, particularly the Maker Spaces and Flexible Learner Spaces. The district will evaluate the use of the equipment and how the community responds.

Ms. Shifley added that this is all new to them, and they want to ensure the program funding going forward. They have set aside resources in the future to replace the initial equipment on a regular cycle. At that point, they will be able to make an educated evaluation of the use of this program and decide whether or not to move forward with the program. If the decision is to move forward, the expenditures will be worked into the district's operations.

**Commissioner Burton asked the following questions:**

Challenges finding staff to act as a Person-in-Charge have meant decreased service for some locations. The budget mentions a new model for Person-in-Charge coverage. What is the current status of this issue, and what has the Library done to ensure appropriate staffing is available going forward?

Ms. Lewis said yes, she would start by briefly explaining the duties of the PIC. The district has staff

who can opt-in to serve as a Person-in-Charge at every library location. They have every level of staffing required for people who can serve as a PIC at each library location. That person is responsible for enforcing library rules as a primary duty of the PIC, even though many other responsibilities include last-minute scheduling changes if someone is out sick. That person is responsible for enforcing library rules and working closely with contracted security and library safety liaisons to address situations that need security support. The implementation of the opt-in Person-in-Charge model has had its challenges. Beginning in March of this year, any represented staff person can choose not to have the Person-in-Charge role for their location. This change is something the union advocated for and allows staff who may not feel comfortable de-escalating a situation not to take on that role.

Many staff members continued to opt in, but this did not meet the coverage needs. Every library location has a designated number of minimum PIC-trained staff onsite at any one time, including the manager. The district has reassigned staff who opted in to ensure more coverage at locations that don't have enough people who have opted in. However, they experienced service disruptions when they could not meet that minimum.

Across the system, the district experienced nine instances of reduced services since the new model began--of those, just two were full closures. As you saw in the FY 25 budget, the district is piloting a different approach to ensuring sufficient PIC coverage. The FY 25 budget proposal adds resources to create seven limited-duration library supervisor positions. This is a new approach, as the district doesn't have many library supervisors currently, but these are managerial positions for which they can hire specifically to help support PIC coverage.

Five limited-duration Library Supervisors have been hired at Belmont, Northwest, Holgate, Midland, and Hollywood. The district plans to open another recruitment in late June to hire the Library Supervisors for Rockwood and Gresham libraries.

These new positions aim to boost coverage at the highest incident locations and reduce the need for staff opting in as PICs to meet coverage needs. These two-year positions aim to assess and evaluate this approach before making it permanent or rolling it out more broadly. If successful, the district will work on this in future staffing planning work.

What kind of training do the PIC staff have to enable them to perform their duties?

Ms. Lewis said the PIC training was very robust. Staff who opt-in as a PIC attend a three-day PIC training where they get detailed training on library rules, de-escalation techniques, and how to respond to various circumstances and incidents within the libraries. That is a three-day classroom training. After that classroom training, they also receive on-the-ground training through shadowing at multiple library locations and learning from experienced PICs or persons in charge.

Then, there is ongoing training and support for PICs through safety topics sent out to staff on common things such as de-escalation strategies. The district provides a safety and security trainer responsible for ongoing curriculum development and implementation. In addition to those trainings, the district also offers training through the Crisis Prevention Institute (CPI) that all staff can take. That training is a de-escalation technique for staff.

All staff, whether they opt-in or not, who serve as persons in charge go through a general safety awareness training that the district implemented last year. It is required so that everybody understands their role in responding to a security incident, even if they're not the person taking the lead in addressing a situation.

**Commissioner Mark Wubbold asked these follow-up questions:**

How do you determine if a person has the characteristics and ability necessary to perform the duties of the PIC? Who decides?

Ms. Lewis said there isn't an initial screening for when staff opt-in, but they go through the training process and shadowing process, and then their manager/supervisor onsite works closely with them to ensure they can fulfill their duty. That manager would address any issues regarding that performance as needed on a case-by-case basis.

**Chair Quiroz asked the following question:**

The Holgate Library will reopen in FY25 and will have triple the space of the current Library. The East County Library will be another new, large facility. How are you considering safety and security as part of the design of these new facilities?

Ms. Shifley said every new or renovated library space is informed by modern principles of design related to security. All major library projects benefit from a contracted security consultant, and that team reviews all the designs and makes recommendations on improving security before those designs are approved. That has been an integral part of the design work,

In addition to improved security camera coverage, lighting, and shorter shelves to improve visibility, the Library is rolling out a new service model with more staff on the floor "orbiting" and not fixed to a single desk.

The district also plans to have contracted security at Holgate and East County Library facilities. They will talk more about this on question seven, but the district is piloting new technology for staff to improve onsite communications.

These are just some of the ways - from design to technology to staffing to training – that the district is trying to balance open access for all alongside having a safe and welcoming environment at the libraries.

**Commissioner Donahue asked the following question:**

The new capital projects are changing how libraries function. We've heard from some in the community that it feels as though libraries are changing into community centers. How would you describe the shift happening at libraries, and how is this model poised to better serve our community than the previous model?

Ms. Lewis said the libraries stopped being only a place for books long ago. Today, they offer much more: physical space to read, collaborate, or use technology and to get personal assistance in a unique space for everyone to use. In the past, staff looked at the value or "busyness" of libraries along primarily transactional lines: the number of books checked out or the number of informational questions answered. That's no longer a good way to describe their use or to plan for the future.

Over the past generation or so, the world has embraced technology in everyday life, so some of those needs have changed, but other significant changes have been underway. The staff has seen the commodification of so-called third places, where someone has to make a purchase or have a certain status to use the restroom. Libraries exist in contrast to those trends. The goal of the public library is to be flexible as community needs evolve and to remain responsive instead of proscriptive about what a "valid use" of the space might be.

The essence of the public library is that it should be free and open to all. If the criticism of libraries as community spaces is that they welcome people who might not have other places to be, that is okay. Libraries should be places for everyone, and in any instance where the Library can reduce barriers in people's lives, staff will seek to do that.

The county's libraries do and will have much more to offer. As staff continues to focus on the human experience, they will provide new spaces and resources for self-determination. Those will include new teenage spaces, more community rooms for groups to gather, studios with cutting-edge

audio/visual technology, and more. County libraries will be more flexible, too, so it's easier to change when needs shift. Libraries will remain flexible and responsive to new needs and changing conditions.

**Commissioner Wubbold skipped this question but asked that it be included along with the written answer in the minutes of the hearing:**

*Last year we spoke about concerns regarding reduced materials available in libraries. We know patrons will be able to request materials from the operations center to be delivered to their local branch, but what about the happy discoveries that come from browsing? Are there new ways the Library is working to connect community members with new books?*

*Following is the written answer provided by the district.*

*The Library uses many tools to connect patrons with the books they want, including book lists, book displays at locations, everybody Reads, and always having staff available that are trained in reader's advisory.*

*It's important to note that there isn't necessarily a correlation between more materials and better success in finding what you want-- actually, a more curated collection usually leads to higher circulation. People find it easier to identify something appealing, and can navigate through the resources and books a little more easily.*

*We're also well on the way to rolling out the Intelligent Materials Management System, or IMMS. This system will work with our Integrated Library System and our Automated Materials Handling systems to make our collection more responsive to community needs.*

- IMMS will allow the collection to be more dynamic in public locations by providing more granular data on collection usage and demand that can enhance materials selection.*
- IMMS will shift books that are in high demand to the right location in the system to meet community needs, based on usage trend information and settings determined by Library and collections staff.*

*Books aren't going away - patrons will have plenty of opportunity to browse and discover new materials - but we're increasingly using data and technology to shift books across the system, and to have a dynamic collection that is easily navigated and responsive to community needs.*

**Commissioner Wubbold asked the following questions:**

Last year, we spoke with you about the Library District's special projects program, which included a pilot for staff technology, from communications equipment to mobile computing solutions. Can you tell us more about this pilot? What is the current status?

Ms. Shifley said the Library is investing significantly in patron-facing technology through the bond program. Staff-facing technology is not a focus of the bond, so the Library set aside resources to upgrade library operations during this transition period in support of the new Patron Service Strategy.

Staff technology project plans include:

- Staff phones to support and engage with new systems, like IMMS and AMH.
- New audio-visual equipment in staff workrooms.
- Mobile device kits contain tablets with ergonomic cases and straps, apps for materials movement, patron interaction, language translation and interpretation and information services, and productivity tools.
- Dedicated loaner laptops for meeting rooms.
- Relay+Pro pilot deployment at library locations.

Many of these investments are self-explanatory, but they wanted to share more detailed information about the pilot communications equipment.

Relay+Pro is a wearable voice communications platform used across many industries for effective frontline communication. The platform also offers a mobile app that enables MCL PIC phones to be used as a Relay device. All Relay devices are assigned into groups by library location, enabling floor staff to stay connected during operations and security incidents.

Relay+Pro is currently running in Central Library and will be deployed at Holgate, Midland, and Fairview when they open soon. This program has already been tested at Gregory Heights, Capitol Hill, Hollywood, Woodstock, Kenton, and Hillsdale. The pilot has been running for a year and has moved through several small and large locations to test how it might be incorporated into staff routines, coordinating with security personnel for significant events, and conducting location open/close operations. Testing has been aligned to support the current service model and the new Patron Service Strategy.

The platform has potential as a practical, affordable, and flexible solution for frontline communications and could be integrated as a layer in workplace security objectives. Staff is still learning and can report back as they continue to evaluate over the next year.

**Chair Quiroz asked the following question of the retiring Director Oehlke:**

You've served the Library as Director for 15 years, and during that time, you have seen exciting changes in the library system and many unique challenges. Please share which accomplishments you are most proud of.

Director Vailey Oehlke said it is undoubtedly a time of deep reflection and that reflection can be gratifying, exciting, and sad. It allows you to think about, "Was it worth it?" Her career goal was to do work that made a difference in people's lives and the community in which she lived. She said she was lucky to end up working at a public library system. That wasn't a grand plan. Even before she was the director (she started as a youth librarian), she was always mildly obsessed with the future of the public library institution.

She said we all grow up with public libraries. We take them for granted and have an iconic understanding of a public library. Early on, she was concerned that that iconic historical understanding would be the undoing of the institution moving forward. As the world and technology changed and impacted libraries' work, people asked the same question: Why do we need public libraries? Everybody is getting their books online. She spent much of her time trying to answer that question.

She expressed that as she was sitting here with Annie and Katie and listening to them talk, responding to the TSCC Commissioners' questions and talking about these new buildings and what a public library is now, she thought, "Oh, okay, I did my job.", Multnomah County Library is at this place where not just the folks who work there, but also the community we serve, is shifting what they understand a public library to be and why it needs to be that.

Ms. Oehlke went on to say what she is most proud of. It has been a team effort with lots and lots of people, and we are creating a public library that will continue to adapt to how the world is changing and will impact people's lives in ways we never anticipated.

She reflected that she started at the Library the year before Google was launched. Imagine how much the world has changed and will continue to change, and she has every confidence that this Library District has those muscles. The folks that work there and the community that supports it all understand that what's important about the public library sort of writ large is not just that it has books available to people but that it is a place, as Annie said, that is intended for everyone, no matter who they are, no matter their background, no matter their resources. It's not always pretty for that reason.

It's messy sometimes. But that is so core and important to what it means to be a public library. That allows the Library to continue to adapt and change as the communities adapt and change. The fact it is free! She said you can't overstate how important that is at a time when so much in the world is commodified.

She shared a few of the things that she is most proud of:

- The role she played was to change libraries so they are no longer just about books!
- Helping to create the Library Taxing District has created a lot of stability for this Library, which was desperately needed. She is grateful to the many people who made that possible.
- The work that the Library is doing and the county writ large around equity driving that into operations and the daily work of the Library. It goes beyond just a nice statement to reflect how choices are made and where they are fundamentally putting resources.
- These new spaces manifest everything the district has been discussing for a long time. When you walk in there and experience that space, it's pretty incredible and wonderful for this community.

She thanked TSCC for the opportunity to express her appreciation to the people she worked with at the job she enjoyed.

Chair Quiroz thanked Director Vailey Oehlke for her service to the community and Annie Lewis and Katie Shifley for their responses to the questions and contributions to the hearing. Then, she closed the hearing and opened a regular meeting of the Tax Supervising and Conservation Commission to certify the County Library's 2024-25 Approved budget. She asked if the TSCC commissioners had any questions or comments to make concerning the budget. There were none.

Chair Quiroz asked Executive Director Allegra Willhite to give staff recommendations for the certification letter.

Ms. Willhite said she thanked Annie Lewis, Katie Shifley, and the Library Staff for their partnership throughout the budget process. TSCC staff appreciates that they answer questions quickly and proactively reach out when they have budget questions so they can collaboratively work through some tricky issues together. TSCC staff found the budget staff estimates to be reasonable and in substantial compliance with budget law and suggests no recommendations or objections to the fiscal year 2024-25-approved budget.

Chair Quiroz called for a motion.

Commissioner Wubbold moved to certify the County Library District's Approved Budget with no recommendations or objections as recommended by staff. Commissioner Donahue seconded the motion, which passed with a unanimous vote of the commissioners.

There being no other business, Chair Quiroz closed the meeting.