

## VISION INTEGRATION

### Progress Report

presented at the Vision Steering Committee 13-2-01

#### **Purpose :**

The purpose of this paper is to communicate and clarify the Vision integration process, to review the progress of integration to date and to identify future funding options for the service.

#### **Background**

The Vision service was established in 1994 as a fast-response extended reference service to public libraries utilizing the collection of the State Library. It was funded initially through a Cooperative Development Grant (until 1997), by the Network Services Division of the State Library from 1997 – 1999, and for the past year through the Statewide Projects administered by the Library Network Unit. The service has been coordinated through a Steering Committee with substantial representation by public libraries.

The Vision integration process began in 1997. It was apparent that there was a need to investigate opportunities for productivity improvements which might assist to contain rising salary costs. These rising annual costs were a concern to the Network Services Division. This was the stimulant for the 1999 *Report for VICLINK on the Strategic Options for Vision Operations*, prepared by Jim Badger and Jenny Stocks. The report outlined a proposal for the integration of Vision with State Library Services and the precise implementation details, both operational and financial, of the integrated services were to be negotiated in the first year of the plan. The following elements of the plan were also proposed :

- the presentation, endorsement and review of a Service Agreement
- a review of staffing and work allocation
- the re-evaluation and re-formulation of the terms of reference for an advisory committee.

The report detailed several related issues which would require a “watching brief” during the integration period, namely:

- developments around digital reference services
- the complex and dynamic relations between the State Library, public libraries and their relevant units and committees
- SLV reference services’ continuous improvement initiatives
- the apparent and expected decline in demand for both Vision and SLS extended reference services

The three year integration program was to cover the following years :

Year 1	July 1999 – June 2000
Year 2	July 2000 – June 2001
Year 3	July 2001 – June 2002

## **Progress to date**

### **Year One July 99 – June 00**

During year one progress on the integration process was hampered by a number of factors :

- 1) Clear communication was difficult due to concern relating to the impact of change on the existing staff
- 2) Discussion around the issues of grant funding for an ongoing operation, particularly in relation to rising salary costs, became difficult given the situation described in 1)
- 3) The resignation of Jim Badger in March 2000 and the subsequent management vacancy.

#### *Operational integration and productivity improvement*

Operational integration commenced during year One with a training session for a number of State Library staff to outline the nature and purpose of Vision. These staff were subsequently rostered to weekly shifts in the Vision service and continue to do this up to 6 hours per week according to service demand.

Greater integration of the Vision staff into the organisational life of the Library was achieved with their full involvement in training and professional development programs and general State Library continuous improvement initiatives.

Improvements to the reference inquiry service efficiency within State Library Services were delivered through the implementation of a RIM-r database. This database enabled better recording, tracking and analysis of extended inquiries and improved turnaround times. Performance improvement meant that 71% of those inquiries were being completed within 5 days, with 53% completed within two days. ( State Library Services staff's off-desk activities include collection development, web-page creation and process review in addition to deferred reference inquiries).

#### *Budget integration*

A number of costs were taken over by the State Library during year One of the process. Operating costs (all stationery, software upgrades and technology support, staff training costs) of up to \$10,000 per annum were absorbed.

### **Year Two - July 2000 – June 2001**

A realignment of SLS management roles in July 2000 placed responsibility for the Vision service with the Customer Information Services Manager.

#### *Service review*

The Vision coordinator's resignation provided an opportunity to examine the service's operations in the light of the integration process. The major aspects of this review process have been:

- 1) Analysis of public libraries' use of the service to determine its cost-effectiveness.
- 2) Analysis of staffing and work allocation, and particularly of the coordinator's role to determine its importance in the ongoing delivery of the service.
- 3) The implementation of the RIM-r database for Vision inquiries to ensure that the same performance measurement and work practice system was applied to all inquiries within SLS.

#### *1) Public library use of the service*

In the calendar year 2000, 2050 inquiries were answered by Vision staff. This was a reduction of 253 inquiries on the previous year and it continued the overall downward trend in inquiries referred to the service since 1996-97, when the annual total was 2840.

Analysis of the year 2000 inquiries shows that use of Vision by individual library services varies greatly, with country libraries demonstrating the highest use levels relative to their total inquiries. Based on usage over a sample month (in May 2000, a total of almost 200 inquiries), 88% were assessed by Vision staff as being able to be answered only by SLV resources. This suggests that referral is occurring appropriately and that the service provides information not available elsewhere. It is therefore still a valuable and needed service.

## 2) *Staffing and work allocation*

The primary tasks of 3 staff (2 FTE) have been to answer information inquiries for public libraries. In previous years they have had the secondary role of delivering the majority of the reference training.

The co-ordinator's role was a 0.8 position which encompassed the following responsibilities and tasks:

- Liaising with public libraries through attendance at a variety of meetings (Reference Librarians' Coop, Vision Steering Committee) and some direct visits
- Managing the Vision team (2 FTE).
- Attendance at relevant State Library Services meetings
- Monitoring Vision statistics and budget
- Report-writing on a quarterly basis for internal reporting on performance

The coordinator did not undertake any reference inquiries. Following the VICLINK endorsement of the proposal to transfer training responsibilities to the Statewide Training Project, the earlier task of coordinating 6 half-day training sessions annually was removed from the role.

### *Operational integration and productivity improvement*

Since September, following discussion with the Steering Committee, the coordinator's role has been absorbed into State Library Services as part of operational and budgetary efficiency. The relationship developed with the Steering Committee and Reference Librarians' Cooperative has been fully maintained and improved liaison has occurred with the Statewide Projects Unit.

Due to the Statewide Training Project budget being established for the year prior to the change to the Vision Service Agreement, State Library Services has agreed to deliver two subject-based reference training sessions for public libraries prior to June 2001.

Productivity improvement to date in the deferred reference inquiry service within SLS is 73% within 5 days. (Actual performance was 89% against the State Library KPI target of 85% within 10 days).

### *Budget integration*

Projected cost of service for the 2000-2001 financial year is \$150,695 as below :

<b>Income</b>		<b>Projected expenditure</b>	
Grant	135,000	Salaries	145,695
Carry forward	5068	Copier	3,000
SLV Recurrent	11,834	Mousemats	2,000
<b>Total</b>	<b>151,902</b>	<b>Total</b>	<b>150,695</b>

As a result of the integration of the Coordinator's role into State Library Services management, savings will be delivered to the project this year.

All operating costs continue to be fully absorbed – utilities costs, IT infrastructure and support, administrative support, staff development and collection value.

### Options for future funding

There are three options for the future funding of the Vision service indicated below with the impacts and issues related to each option.

OPTION	IMPACT / ISSUES
<p><b>A.</b></p> <p>Maintain status quo as for 2000-2001 year ( staffing with 2.8 FTE – this includes a Coordinator)</p>	<ul style="list-style-type: none"> <li>• Public libraries retain same level of close involvement</li> <li>• No funds returned to Statewide projects</li> <li>• Continued rising annual salary costs</li> <li>• Lost opportunity to capitalise on productivity gains achieved to date</li> </ul>
<p><b>B.</b></p> <p>Reduce Statewide funding component (staffing = 2 FTE)</p> <p>0.8 Coordinator position did not undertake reference inquiries. Coordinating role will sit with a senior manager in State Library Services</p>	<ul style="list-style-type: none"> <li>• Funding for 2 x VPS2 staff from grant funds estimated at \$90,000 (either Statewide Projects or Network Support funding). It should be noted that separate funding will continue to bring rising salary costs</li> <li>• All management / admin / liaison absorbed by SLV. Leneve Jamieson will be the continuing SLV management contact for public libraries. The significant savings made as a result of this are assessed as the maximum possible savings while demand is at current levels and service standards remain as per current service agreement</li> <li>• Public libraries retain ownership and substantial involvement</li> <li>• Service Level Agreement is basis for SLV accountability to public libraries and annual reporting to VICLINK on performance occurs against this agreement</li> <li>• Training is offered through Statewide Projects</li> <li>• Attendance by SLS Managers or Vision staff at relevant public library meetings</li> </ul>
<p><b>C.</b></p> <p>Fully-funded SLV</p>	<ul style="list-style-type: none"> <li>• No public library control - issues around levels of trust between public libraries and the SLV.</li> <li>• SLV would have full accountability for delivering on Service Level Agreement – current service levels could not be guaranteed</li> </ul> <p>Training is offered through Statewide Projects</p>

## Recommendations

- Option B is accepted as the continuing annual requirement to maintain the service standards specified, given the current level of demand in the integration process
- The Statewide Projects Committee adopts a long-term role of monitoring against the Service Level Agreement with review of the Agreement on an annual basis. Regular reporting to VICLINK will continue.
- The Vision Steering Committee continues to meet regularly
- Vision staff are managed effectively and appropriately within the State Library's human resource guidelines
- The State Library's Customer Information Services Manager continues to take an active liaison role with public libraries

## Implementation Schedule

Report to Vision Steering Committee	13 February 2001
Report to Statewide Projects Committee	20 February 2001
Report to VICLINK Executive	5 March 2001
Endorsement by VICLINK	10 April 2001
Budget preparation for Statewide Projects Committee	April / May 2001
Recommendation to VLNC	12 June 2001
Endorsement by Library Board	4 July 2001

## Attachments

1. Documentation on the integration process
2. Performance against the Service Level Agreement

**Consultation** : Cathrine Harboe-Ree, Prue Mercer, Vision Steering Committee

**Author** : Leneve Jamieson

**Date** : 13 February, 2001 amended 19 February, 2001

## Appendix One

### Documentation referring to the integration process

#### **April 1999**

Paper outlining strategic direction for Vision (Jim Badger, Jenny Stocks)

#### **June 99** VICLINK minutes

“that the possible integration of Vision with the State Library reference service be referred to the August meeting of VICLINK and that a draft service agreement, a project plan and the results of consultation with CPLG be presented to that meeting”

#### **7/6/99**

*Report for VICLINK on strategic options for Vision operations Badger, Stocks*

Implies that ongoing continuous improvement approach to SLS reference service, decline in extended reference inquiries, decline in demand for Vision and possible development of new services will impact on the nature of integration (24/7)

#### **8/7/99**

Letter Alasdair Wardle requesting clarification on the issue of Vision funding “My understanding is that the State Government will specifically allocate the \$100,000 for the integrated Vision service. The \$36,000 that is saved if the Vision service is integrated will then be available for other Statewide initiatives for public libraries.”

#### **27/7/99**

Letter Cathrine Harboe-Ree explaining the Government funding provision to support cooperation and development of the statewide network of libraries.

“Most of the Vision project is funded from this source . . . the State Library provides some support for Vision but the \$150,000 budgeted for 1999/00 is from the Government appropriation. Any savings resulting from changes to the mix of projects and other items funded through the Networks Unit budget are available only for other statewide initiatives. . . I think it would be a good idea to incorporate Vision as a statewide project in the future, as that would probably make it more obvious that any savings would be of benefit to public libraries.”

#### **27/7/99** – VICLINK Executive minutes

“ {the Service Agreement} is still a working document. Letter clarifying funding received from Cathrine Harboe-Ree. This letter to be circulated with the VICLINK minutes. Meeting agreed that the steering committee should make recommendations concerning the Service Agreement, but that the final decision rested with VICLINK. The Executive to endorse final draft. Meeting agreed that eventually Vision should become a Statewide Project”.

#### **10/8/99** VICLINK minutes

“Some changes have been suggested to the Vision Service Level Agreement to improve turnaround time and training. Alasdair Wardle reported that there had been consultation with the CPLG and there had been general agreement with the integration with the State Library reference service model provided that service was delivered to the same or improved levels”

Moved “that VICLINK supported the integration of Vision into the State Library reference service provided that service levels were maintained by the Service Level Agreement”

**19/10/99** VICLINK minutes

“Draft Vision Service Agreement was circulated before the meeting. The integration of Vision with the State Library is conditional on VICLINK agreeing to the Service Agreement.

Moved “that the draft Vision Service Agreement be accepted as the basis for defining the service relationship between Victorian public libraries and Vision”

**Appendix Two**  
**Performance against the Service Agreement Year 1**

The performance of the Vision service against the Service Agreement was as follows for the year commencing July 1999. Changes to the Agreement for the second year of integration relate principally to the move of training responsibilities to the Training Committee of the Statewide Projects. A similar report against standards will be produced in July 2001.

<b>Performance standard</b>	<b>Target</b>	<b>Actual</b>
Number of inquiries	2500 ( subject to the demands on the service)	2100
Turnaround time	85% completed within 2 working days	92% completed within 2 working days
Time taken per query	1 hour limit per question	1 hour
Satisfaction with service (by annual survey)	90% indicate responses "relevant" to their needs 90% rate service "welcoming" or better	Survey q'aire sent April 99 – minimal response from public libraries. Agreed Stg C'tee minutes May 2000 to abandon and replace with letter
<b>Training</b> Courses developed for public libraries	6 half-days of training held per year. This will be subject to the demand for training	Training delivered at : Darebin, Shepparton, Murrindindi, Swan Hill, Whitehorse M'ham, Central Highlands
Satisfaction with training sessions	85% attendees rate training "very good" or higher	88%
<b>Liaison Promotion</b> Number of visits by Vision staff to libraries	Visits as required in consultation with public libraries	Visits to : Wangaratta, Upper Murray, Casey Cardinia, Frankston,
Number of visit by public library staff to SLV	Staff from 15 different libraries to visit SLV	Visits by staff from : Bayside, Maribyrnong, Ref Coop attendees at SLV
Number of newsletters distributed	4 per annum	4
Web page developed and maintained	Page updated 4 times per year	6 times
Regular meetings of Vision Steering Committee	4 meetings per annum	4
Vision Committee review of agreement	Review and redraft by May each year	Review/redraft June
Vision Steering Committee advocacy and reporting role	Committee to include 2 ref. librarians, a country public librarian and a public library manager	Committee included : Ainslie White, Alison Katona, Doreen Waters, Heather Phillips, Gay Sussex

