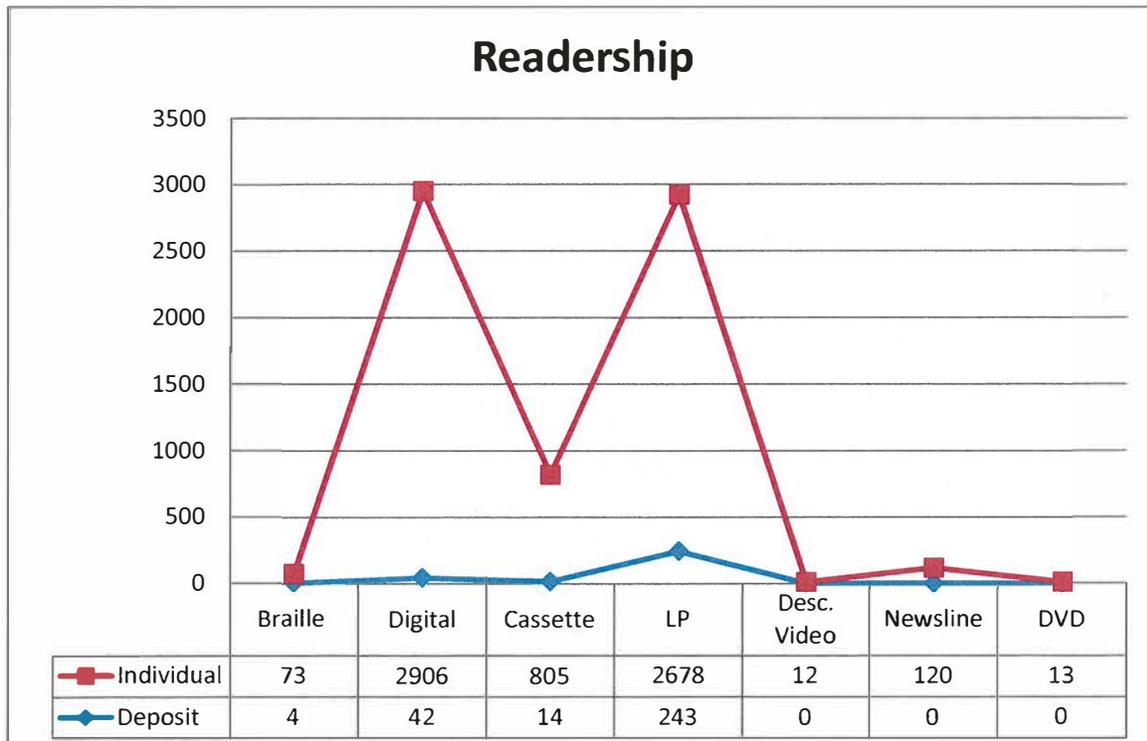## LIBRARY OF CONGRESS

**Site Visit April 16-17, 2015
Idaho Commission for Libraries Talking Book Service
Boise, Idaho
Pamela N. Davenport, Network Consultant
Sue Walker, Regional Librarian**
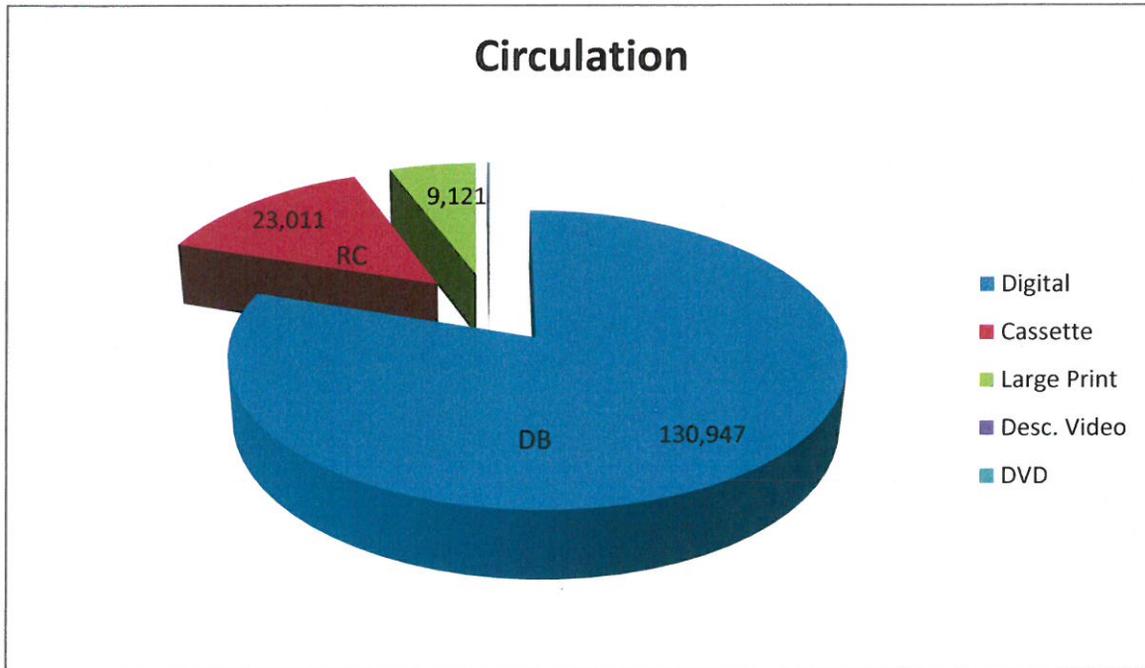
Introduction

This report is based on observations at the Idaho regional library (RL) on April 16-17, 2015, and on documents supplied by the RL. It updates information, findings, and recommendations of the consultant report based on a visit, April 25-26, 2013 and uses the American Library Association's *Revised Standards and Guidelines of Service for the Library of Congress Network of Libraries for the Blind and Physically Handicapped*, 2011 as the basis for its findings and recommendations.

As of September 30, 2014, the RL served 3,350 individual readers and 250 institutions in Idaho. The RL is the machine-lending agency (MLA).

Readership by format is broken out as follows:

Readership

	Braille	Digital	Cassette	LP	Desc. Video	Newsline	DVD
Individual	73	2906	805	2678	12	120	13
Deposit	4	42	14	243	0	0	0

Circulation by format follows:

Circulation

Legend:
- Digital
- Cassette
- Large Print
- Desc. Video
- DVD

Chart labels: 23,011 RC · 9,121 · DB 130,947

The RL contracts with the Utah State Library, Program for the Blind and Physically Disabled, to provide its braille readers with service. In 2014, 602 patrons established service and 647 patrons discontinued service.

The narrative of this report describes the standards being met by the library. The recommendations fall into several categories: those regarding compliance with the standards, others relating to streamlining the RL's operation and still others supporting NLS policies and procedures.

Provision of Services

The RL does register patrons in compliance with P.L. 89-522 (Pratt-Smoot Act as amended and extended). The RL does maintain patron information needed to meet NLS requirements and to enable it to provide service, resulting in quantifiable information, while maintaining patron confidentiality. The RL gives preference at all times to the needs of blind and other eligible print-disabled persons who have been honorably discharged from the armed forces of the United States.

The RL has developed a relationship with specialized schools to ensure that all eligible children are registered for NLS services. The RL has a librarian from the Idaho school for the Deaf and Blind on the TBS advisory committee, and staff works with the school to keep it current. Library staff also visits the school at least once a year to meet with faculty and students.

The RL is the machine-lending agency for the state. Equipment and accessories are provided within two business days of a patron application or request. The RL provides playback equipment and accessories' using an equitable distribution policy, taking into consideration that federal law gives preference to veterans and NLS policy gives secondary preference to centenarians.

The RL does maintain its book circulation and machine-lending functions electronically, uploading BARD circulation to the Keystone Library Automated System (KLAS) 7.5r4c. There is an established loan period. Patrons are informed of the loan period when service is initiated and that loans can be extended by contacting the library. The RL sends generic overdue letters quarterly. No fines are levied on materials from the national collection. Replacement fees are charged for lost or damaged descriptive videos or DVDs.

The RL collaborates, as appropriate, with libraries and other organizations to facilitate fulfillment of reference requests. The Idaho Commission for the Blind and Visually Impaired provides braille correspondence for the RL.

The regional library is housed within the Idaho Commission for Libraries (ICFL). Hours of public service, 8:00 a.m. to 5:00 p.m. weekdays, are determined by the state facility in which they are housed.

The RL does strive to ensure that services meet individual reading preferences and patterns. Each patron has an opportunity to change their own areas of reading interest and order specific materials. Subject catalogs and magazines are sent to assist with reading selection. Each patron's profile on the KLAS system specifies the areas of interest and also notes any exclusion they may have indicated. The RL has four readers' advisors which are referred to as customer service representatives.

The RL does provide languages other than English, such as a very limited Spanish collection. The demand is primarily met with NLS resources, a few locally produced titles, and interlibrary loan. The RL uses the state program *Careline 211* which provides help and information for non-English speakers.

The RL does serve walk-in patrons. Visiting patrons may have materials checked out through KLAS' "Front Desk" function.

The library informs patrons of services offered by public libraries through articles in its newsletter, contacting users by letter, and on their website. The RL staff work with other local libraries and network libraries as needed.

The quarterly newsletter, *Connections,* is available in large print and audio formats, and is available via e-mail or as a podcast on the RL's website.

The RL does maintain a fully accessible public website. Patron requests are accepted through the website and e-mail, as is feedback.

The library does have an online public access catalog (OPAC) with its circulation system.

Fillable applications for individual and institutional service are available for downloading, and printing from the website.

Resource Development and Management

The RL does produce or acquire reading materials to supplement the national collection as appropriate to the community. The RL does share locally produced materials with other network libraries by listing them in the *NLS Union Catalog*. The RL has in the past, but not currently, submitted locally recorded materials to the MSCE Quality Assurance Program.

The library does maintain access to collections of sufficient quantity and condition to meet patron demand in a timely and responsive manner. The RL does maintain a non-circulating master of all locally produced materials. The RL does have the capacity to reproduce accessible formats produced for the national collection according to NLS quality-control standards. The RL uses the single copy (patch cord) to download from BARD. The RL is using KLAS's Download on Demand functionality.

In FY 2014 the RL produced 33 books. The RL has 300 analog and 553 digital circulating titles. The RL is commended for the quality of their locally recorded materials.

The reader advisors select the number of copies of each new title produced for the national collection through copy allotment.

The RL does ensure patrons have access to braille materials produced by NLS. The RL has contracted with the Utah regional library for braille service.

The RL uses the Keystone Library Automation System (KLAS) circulation system. The system does have the capability of downloading bibliographic data from the NLS network library website.

RECOMMENDATION:

- Submit locally recorded materials to the MSCE Quality Assurance Program.

Public Education

The RL has developed and implemented a coordinated public awareness program for use in its service area. The plan emphasizes statewide awareness of RL's programs and targets public library directors, schools administrators, service organizations and veterans' organizations for contact. Under the state's organization chart the RL's director is a library consultant. This provides her with the opportunity to inform the public about this service and educate other Idaho libraries about it as well.

The RL has not developed and implemented public awareness programs and materials targeted at students in library science, education, social services, and similar college and university programs as appropriate in their local service areas. The RL continues to follow up on all outreach opportunities and work with the advisory committee to identify additional opportunities.

RECOMMENDATION:

- Continue to develop and implement public awareness programs and materials targeted to promote TBS and increase readership.

Consulting Services

The RL does not have any subregional libraries in the state. However, it will advise and assist other libraries and agencies in the development of services in its geographic service area upon request.

The library does participate in peer consulting through NLS, ALA's Association of Specialized and Cooperative Agencies, regional conferences, and other professional exchanges.

Volunteers and Internship Programs

The RL does utilize volunteers to assist in the performance of activities that supplement its basic program of services. The RL's volunteer program is managed in accordance with administering agency policy and practice. The RL has developed and implemented an organizational structure for its volunteer program. Volunteers are not used in place of paid employees nor have paid employees been replaced by volunteers.

The RL does provide training, orientation programs, and materials for volunteers that include sensitivity to blindness and disabling conditions as well as the structure and philosophy of the service.

The RL uses volunteers in a number of areas. Primarily, volunteers repair equipment, record titles for the RL's collection of volunteer-produced titles, run the duplicators, and inspect returned books.

The library has a large collection of volunteer recorded titles. These were produced by volunteers who record in the studio at the RL.

The RL has developed and implemented an annual program that recognizes volunteer activities. This volunteer appreciation event is usually celebrated in April. The RL also includes volunteers at holiday luncheons, the Fourth of July picnic, TBS Awareness Day, and retirement parties. The volunteer coordinator manages this program. The RL is commended for ensuring that volunteers are recognized for the great service they provide.

The RL does, on an ongoing basis, work to identify new volunteer sources for equipment repair and other areas where additional support is needed.

The RL does not use interns to assist in the performance of activities that supplement its basic program of service. The RL has not developed and implemented an organizational structure that formally incorporates administration of the intern program.

RECOMMENDATIONS:

- Develop and implement an organizational structure that formally incorporates administration of the intern program.

- When intern program is developed provide training orientation programs and materials for interns.

Administration/Organization

The RL does have the responsibility for the machine-lending function as described in the Machine-Lending Agency Service Agreement. The MLA has no designated sublending agencies (SLAs).

The library does comply with laws and regulations pertaining to rights of and services for persons with disabilities.

The Idaho Commission for Libraries is responsible for the development and coordination of the regional library directly through its administration and budget. The RL does provide a means of rapid communication with cooperating units. The RL has established deposit collections and demonstration collections to extend its

services. Deposit collections are monitored during visits to the libraries by the librarian and monitoring through the circulation system to identify any that is inactive.

These standards are applied appropriately to all network cooperating units, including contractors, institutional borrowers, and all others who perform services and functions covered in the standards.

The RL does encourage advice and input from a full spectrum of patrons and patron constituency groups through its advisory council. The TBS advisory committee contains user representatives and meets quarterly. The RL surveys its patrons biennially. The survey is also online. The staff request user feedback during calls and other interactions. The library director meets regularly with public library directors. The RL does not have an established Friends group.

RECOMMENDATION:

- Continue to regularly monitor deposit collections.

Budget and Funding

The federal and state governments do contribute funds, resources, and services to ensure the provision of this library service to eligible residents of Idaho. The Talking Book Service (TBS) is currently funded primarily through federal LSTA funding.

Funds intended for seed funds, demonstration projects, and similar grants are not used to fund long-term ongoing operations. The library provides NLS-mandated and supplemental services to patrons such as descriptive videos at no charge.

The administering agency does commit resources to enable the library to effectively administer and facilitate services as defined by the ALA Standards with the exceptions noted in the recommendations.

The regional librarian does have primary responsibility for planning and administering the budget or presenting it to appropriate groups within the administering agency. The regional librarian attends management meetings for planning for the general budget for the Idaho Commission for Libraries to provide input for the Idaho talking book library and administers the Commission's LSTA funds. The administering agency does consult with the head of the regional library before any action is taken affecting the finances of the RL. The RL does work with the administering agency to obtain outside funding to enhance services.

RECOMMENDATION:

- As soon as feasible, work to obtain funding for the regional library that is not LSTA based.

Planning and Evaluation

The RL has an annual work plan. There is a comprehensive long-range plan, as part of the Idaho Commission for Libraries strategic plan, designed to develop, coordinate, maintain, and improve services and to make optimum use of resources. The plan was developed in cooperation with appropriate constituencies, patrons, the administering agency, and funding agencies.

The long-range plan does include measurable objectives and a timetable for accomplishments. Progress is reviewed regularly and the plan is revised at least annually. The RL is in process of reviewing its long-range plan. The plan was developed in accordance with P.L. 89-522 (Pratt-Smoot Act as amended and extended) and P.L. 101-336 (Americans with Disabilities Act) as well as other appropriate statutes and codes.

The long-range plan is produced in accessible formats, braille, cassette, large-print, and electronic format, and made available to patrons upon request.

The RL has adopted and implemented methods for evaluating patron satisfaction. The RL surveys patrons biennially. Based on patron response all comments are followed up by customer service staff. In addition, comments are categorized and discussed.

Policies and Procedures

The RL does have written policies and procedures for library operations designed to meet service goals. The RL does have a written statement of policy for: collection development and maintenance, materials selection, reproduction of materials in accessible formats, and patron behavior and library usage. These policies are reviewed annually. The RL does include NLS in the development and review of policies as appropriate. The RL should have a policy for interlibrary loan and patron confidentiality.

The RL does provide staff with an up-to-date manual that includes policies and procedures. Services changes are communicated though special mailings.

The RL informs patrons of service policies and changes through its newsletters, new reader packets, and special mailings. Policies and procedures are available on the RL's website.

The RL has developed and made available instructional materials in appropriate formats to assist patrons in the use of this library service.

RECOMMENDATIONS:

- Develop a policy for interlibrary loan and patron confidentiality.

- Review policies and procedures biennially.

Reports

The RL does maintain current and accurate statistical records to document use, services, and acquisitions; to meet the requirements of the administering agency and NLS, and to generate information for planning purposes.

The RL last completed the reconciliation of their files with CMLS in June 2014. This is commendable.

RECOMMENDATION:

- Continue to perform a CMLS reconciliation with the KLAS database biennially. With the migration to the Patron Information and Machine Management (PIMMS) database, this process will not be needed in the future.

Personnel

The RL does operate under a written affirmative action plan. As a division of the Commission for Libraries the RL follows the agency's affirmative action plan and is committed to a policy of non-discrimination. There is an organization chart describing clear lines of authority. A position description does exist for each title or category of position in the library.

The RL and the administrative agency, at minimum of once every five years, do jointly review and determine staffing patterns and requirements based on, but not limited to, the following: long-range plans; demographics of the service population; geography; services provided; service patterns; physical facility; use of technologies; support provided by the administering agency; and the guidelines included in these *Standards*. The RL reviews staffing requirements as vacancies occur and as needs change in the division and the agency, with consideration of changing services and patrons use of technology.

The administrative head of the library does possess a master's degree in library science from an ALA-accredited program. This position is on the same administrative level as comparable unit heads within the administering agency.

The RL is commended for recently sending staff to the NLS Orientation in Washington, D.C.

The RL should continue to send appropriate staff members who have completed at least six months on the job to the NLS three-day orientation program.

The regional librarian did attend and actively participate in the 2014 national conference in Oklahoma City, Oklahoma. The regional librarian attended and participated in the western regional conference in Sacramento in 2015. The regional librarian and appropriate staff should plan to attend the biennial national conference in San Francisco in April 2016. The biennial conference will offer training each day of the conference on new NLS technologies and systems as well as important presentations and meetings focusing on accessible technologies, improving service to LBPH patrons, and NLS policies and partnerships with regional libraries.

The RL does not meet the *Revised Standards...* recommendations for staffing of levels needed for the size of the population: 3,183 individuals and 268 institutions, served. A comparison follows:

Staff	**ID RL**	**Standards**
Librarian		
Administrative	.75	1
Librarian	0	1
(1FTE per 4,000 patrons)		
Reader Advisors	4	2
(1FTE per 2,000 patrons)		
Other Professional/Paraprof.	1	1
(1FTE per 3,000 patrons)		
Technical Staff	0	2
(1 FTE for each 2000)		
Support Staff	2	2
(3FTE per 1,500 patrons)		
Total	7.75	9

The library operation is unique. Observation during this consultant visit indicates the library seems to be well staffed. However, according to the standards the library should be staffed with nine fulltime employees. The RL has only 7.75 employees. The IT person for KLAS could be added as technical staff which would give the library an additional person to include in the effort to better meet the *Standards*.

The RL does encourage and support relevant continuing education activities for staff at all levels of the organization. The library encourages and supports staff participation in professional organizations, site visits and exchanges to other libraries, computer system user groups, and meetings of patron organizations.

RECOMMENDATIONS:

- Continue to send appropriate staff to NLS for the three-day orientation.

- Continue to send appropriate staff to national and regional conferences.

- Continue to ensure that there are enough staff positions to meet ALA *Revised Standards and Guidelines* 2011 and to provide the needed services to patrons.

- Continue to provide orientation and training for staff to meet ALA *Revised Standards and Guidelines* 2011.

Research and Development

RL staff and agency Information technology staff keep abreast of new technological advances and materials. Computer workstations are on a regular replacement cycle. The agency guides all divisions in evaluation, selection and use of equipment to meet specific needs. Internal and outside training is supported. All of the RL staff participates in training on NLS equipment and resources such as BARD.

The RL does use compatibility with local and national systems as a criterion in evaluating and selecting technologies, devices, and electronic systems.

BARD (Braille and Audio Reading Download)

The RL makes BARD available to all eligible individuals and institutions in the state of Idaho.

The RL is responsible for the administration of BARD including reviewing online applications and approving or rejecting patrons for the BARD service; and is first-line technical support regarding the use of BARD. When staff is unable to answer technical questions, patrons are referred to NLS Download for support.

The RL does meet the one-business-day turnaround time to approve or reject BARD applications coming from currently verified patrons as well as approving requests for third-party players within one business day.

Physical Facilities

The physical facility has not changed. The RL's office area is in a public area to the left of the main entrance to the Idaho Commission for Libraries. The collections, recording studio, volunteer coordinator/ studio director, and machine repair/duplication areas are located downstairs.

Machine-Lending Agency

The regional library is the machine-lending agency for the state. There are no sublending agencies.

The MLA submits monthly machine activity reports, as well as machine transfers, obsolete and damaged equipment reports, and Stolen/Lost/Location Unknown/ Recovery reports to Data Management in a timely manner.

The MLA has automated machine files on the KLAS circulation system. The MLA does store equipment in a secure area which is locked and the keys are restricted to a few staff members.

Staff of the MLA responsible for the NLS equipment inventory and control does understand the NLS machine-lending agency standard policy. The MLA does have a written internal procedure for machine and accessory accountability and control.

Equipment returned to the MLA for repair is kept in a non-public area. This area is secured nightly.

The MLA last completed a BPHICS reconciliation October 2014. This is commendable.

The MLA has one Telephone Pioneer group that works at the library's facility. The local repair efforts do currently meet the MLA needs.

Conclusion

Idaho Commission for Libraries Talking Book Service has made great strides in providing a valuable service to more than 3,600 individuals and institutions throughout the state of Idaho. The RL has implemented many of the recommendations made in the 2013 consultant report. It has continued to develop and implement public awareness targeted to promote and increase readership. Also, a promotion is underway to promote literacy services and start a print braille collection. NLS and the RL have implemented many changes and enhancements to the service such as offering the BARD Mobile application. NLS will continue to work

with network libraries to enhance services and increase access to materials in accessible formats. The RL is strongly encouraged to attend the next biennial national conference to be held in San Francisco, California in April 2016 to ensure that the RL is knowledgeable and familiar with existing and new systems/services offered through NLS. The RL should focus on public education and outreach activities in the next two years that will support its goals of increasing readership.

Attachment: Summary of Recommendations

Resource Development and Management

- Submit locally recorded materials to the MSCE Quality Assurance Program.

Public Education

- Continue to develop and implement public awareness programs and materials targeted to promote TBS and increase readership.

Volunteers and Internship Programs

- Develop and implement an organizational structure that formally incorporates administration of the intern program.

- When intern program is developed provide training orientation programs and materials for interns.

Administration/Organization

- Continue to regularly monitor deposit collections.

Budget and Funding

- As soon as feasible, work to obtain funding for the regional library that is not LSTA based.

Policies and Procedures

- Develop a policy for interlibrary loan and patron confidentiality.

- Review policies and procedures biennially.

Reports

- Continue to perform a CMLS reconciliation with the KLAS database biennially. With the migration to the Patron Information and Machine Management (PIMMS) database, this process will not be needed in the future.

Personnel

- Continue to send appropriate staff to NLS for the three-day orientation.

- Continue to send appropriate staff to national and regional conferences.

- Continue to ensure that there are enough staff positions to meet ALA *Revised Standards and Guidelines* 2011 and to provide the needed services to patrons.

- Continue to provide orientation and training for staff to meet ALA *Revised Standards and Guidelines* 2011.

Resource Development and Management

*   Submit locally recorded materials to the MSCE Quality Assurance Program.

Response: This recommendation is under consideration. The primary concern is the length of time required to pass quality assurance which reduces user accessibility to the titles.

Public Education

*   Continue to develop and implement public awareness programs and materials targeted to promote TBS and increase readership.

Response: Currently, staff is working with teachers of visually impaired students throughout the state to increase awareness of the service. Public libraries are being targeted with bookmarks promoting the service.

Volunteers and Internship Programs

*   Develop and implement an organizational structure that formally incorporates administration of the intern program.

*   When intern program is developed provide training orientation programs and materials for interns.

Response: The Talking Book Service does not currently use interns within its program, but the Volunteer Coordinator works with local colleges and universities to determine the interest in doing so. Many current volunteers are highly skilled in areas such as engineering and narration.

Administration/Organization

*   Continue to regularly monitor deposit collections.

Response: This will continue to be done.

Budget and Funding

*   As soon as feasible, work to obtain funding for the regional library that is not LSTA based.

Response: The Management Team will explore the feasibility of this with the agency's fiscal analyst as the FY2018 budget proposal is prepared.

Policies and Procedures

*   Develop a policy for interlibrary loan and patron confidentiality.

Response: This is in progress.

- Review policies and procedures biennially.

Response: This will continue to be done.

Reports

- Continue to perform a CMLS reconciliation with the KLAS database biennially. With the migration to the Patron Information and Machine Management (PIMMS) database, this process will not be needed in the future.

Response: This will be done as needed.

Personnel

- Continue to send appropriate staff to NLS for the three-day orientation.

Response: This will continue to be done. Three staff attended orientation during 2015.

- Continue to send appropriate staff to national and regional conferences.

Response: This will continue to be done. One or two staff attend each conference.

- Continue to ensure that there are enough staff positions to meet ALA *Revised Standards and Guidelines* 2011 and to provide the needed services to patrons.

Response: As noted during the site visit, the current staff allocation meets users' needs. Although the number of staff does not meet the standards and guidelines, additional staff support the staff specifically assigned to the Talking Book Service and allow provision of high quality service and outreach.

- Continue to provide orientation and training for staff to meet ALA *Revised Standards and Guidelines* 2011.

Response: This will continue to be done.