



Oregon State Library Affirmative Action Plan  
July 1, 2017 – June 30, 2019

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## I. State Library Description

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### A. Mission and Objectives

The mission of the State Library is to provide leadership and resources to continue growing vibrant library services for Oregonians with print disabilities, the Legislature and state government, and all Oregonians through local libraries.

The vision of the State Library is that all Oregonians have the information essential to be engaged citizens, to strengthen our communities and to build a prosperous state.

The State Library's Strategic Imperatives for 2014 – 2017 are as follows:

- **Focus on the Customer:** This imperative will be met by developing customer service standards, defining customer segments, identifying potential new customers, and assessing customer satisfaction to determine allocation of resources.
- **Build Awareness of the State Library:** This imperative will require a “reputation audit,” the results of which will lead to the development of an awareness campaign that will result in increased usage of the State Library by key audiences.
- **Cultivate Staff Strengths:** The success of this imperative will require a performance management system that provides a framework for continuous improvement and appropriate professional development for all staff.
- **Enhance Partnerships:** The success of this strategic imperative will require defining the concept of partnership, determining where we can reduce overlap and duplication of services, and working collaboratively with partner agencies to increase effectiveness and efficiency in services to all Oregonians.

The State Library was established as the Oregon Library Commission in 1905 and today provides information services to over 37,000 state government employees. The State Library also circulates library materials in digital and Braille format to approximately 5,000 print-disabled Oregonians and provides grants and assistance to help develop and improve library services, and to foster greater cooperation among all of Oregon's libraries.

Since its founding, the State Library has been governed by an independent board. The present board consists of nine members who are appointed by the governor to serve four-year terms.

The State Library currently has 40.04 full-time equivalent staff (42 positions) and operates with a biennial budget of \$14.1 million.

There are four divisions within the State Library:

*Government Information & Library Services* provides reference assistance to state government and the Legislature. Specialized collections include federal and state government publications and a comprehensive collection of materials about Oregon. The State Library also provides permanent public access to Oregon state government documents.

*Oregon Talking Book and Braille Library* is the Oregon Regional Library for the Library of Congress National Library Service for the Blind and Physically Handicapped. Oregonians who are unable to read standard print because of visual or physical disability are eligible for this free library service. Books and magazines are available in audio format and Braille. Reading materials and equipment are mailed to the reader and back to the Library, postage free.

*Library Support & Development Services* provides planning and assistance for statewide library development by hosting quality websites for public libraries, providing equal access to information resources for K-12 students through the Oregon School Library Information System, collecting and reporting library statistics, and administering state and federal library grant programs. Current library development priorities are improving early literacy service to children in public libraries and facilitating access to library service for all Oregonians.

The *Operations Division* provides administration, fiscal management, information technology support, and volunteer program management services for the agency.

B. Agency Director

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C. Governor's Policy Advisor

Lindsey Capps  
(503) 373-1558

D. State Library Affirmative Action Representative

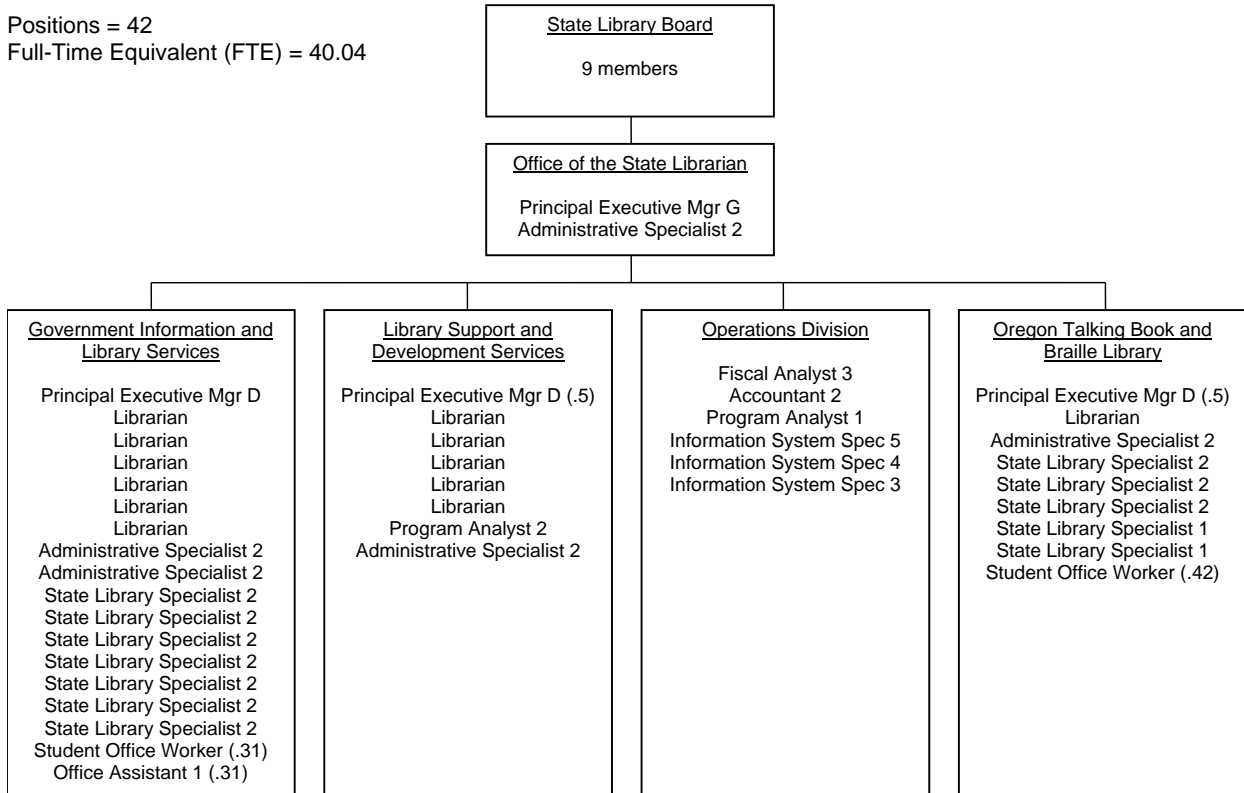
Jessica Rondema  
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E. The State Library does not have a designated FTE for Diversity, Inclusion, Access, or Equity

F. Organizational Chart

Oregon State Library (54300)  
Organization Chart

Positions = 42  
Full-Time Equivalent (FTE) = 40.04



## **II. Affirmative Action Plan**

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### **A. Agency Affirmative Action Policy Statement**

Oregon State Library is committed to achieving equal employment opportunity and affirmative action objectives that will facilitate recruitment, employment, and advancement of a diverse workplace. In administering its programs, the Oregon State Library will not discriminate against any person who seeks employment or is a current or potential user of State Library services based on race, color, religion, sex, sexual orientation, national origin, marital status, age, disability, or any other protected class as defined by federal and state law.

### **B. Agency Diversity & Inclusion Statement**

The State Library strives to maintain a culture that fosters diversity and inclusion throughout its operations, both internally with staff and externally with members of the public, stakeholders, and partners. We accomplish this by increasing diverse and multicultural perspectives, improving business and service delivery outcomes, increasing firm contracting inclusion, improving individual and organizational cultural competences through training and education, actively recruiting from a wider pool of applicants, and improving public confidence and community relations.

### **C. Training, Education, and Development Plan (TEDP)**

#### **a. Employees**

The State Library supports training and development priorities that relate directly to the agency mission and goals. The agency follows the Employee Development and Implementation of Oregon Benchmarks for Workforce Development (Statewide Policy 50.045.01). Below is a description of the training our employees have received over the past year.

On April 1, 2016, the State Library held its first Staff In-Service day offsite, for staff to gather together to hear the same message and participate in morale-building activities. This In-Service also featured a number of speakers, who provided us with different perspectives from their respective fields. Clyde Saiki, who was serving as the Chief Operating Officer and Director for the Department of Administrative Services at the time, was our keynote speaker. He discussed the ability of state government to adapt and implement change. Our lunchtime speaker was researcher and lecturer Dr. David Lewis, a member of the Confederated Tribes of Grand Ronde, who discussed his research. In the afternoon, we had a panel in which three of our patrons from different groups discussed their experiences with the State Library. These speakers included a state employee, a person with a visual impairment, and a school librarian. It was valuable for the entire staff to hear from a representative of the different groups that are served by our different divisions.

Every year, employees of the State Library are encouraged to attend the State of Oregon Diversity and Inclusion Conference. We had at least four staff attend the 2015 conference, who attended the following sessions:

<b>2015 State of Oregon Diversity and Inclusion Conference</b>		
<b># of Staff In Attendance</b>	<b>Conference Session</b>	<b>Topic</b>
2	Before Gender was an Issue: Building Lego Bridges across the Gender Divide	Biological and social gender components that affect differences in workstyles and communication.
2	Bully Nation: Dealing with Workplace Bullying	Definitions and consequences of bullying and ways to address such behaviors in the workplace.
1	He's a Pimp, She's a Hoe: Sex Trafficking in a 'Media Informed' vs. 'Trauma Informed' World	Sex trafficking, understanding how technology and media influence sex trafficking and reinforces violence against women.
1	Understanding Cognitive Bias	Susceptibility to cognitive bias, human thinking shortcuts, and ways we can reduce such biases.
1	Religion in the Workplace	Best practices for creating a religiously inclusive workplace.
1	Redefining Disability	Challenging traditional thoughts about disabilities and discussed progress toward inclusion of people with disabilities
1	Who are the Tribal Peoples of Oregon?	Basics of tribal sovereignty, the diversity of Oregon tribes, and information about lands and resources, history and contemporary issues.
1	Breaking Poverty Barriers	Challenging common myths and brought insight into the challenges facing people of poverty
1	Emotional Intelligence: Self-Awareness, Curiosity and Empathy as an Antidote to Bias	Pervasiveness of implicit bias, cultural filters, and how to improve intercultural flexibility and effectiveness.
1	Gender, Gender Identity, and Social Justice in the Workplace	Experiences with gender and gender identity, how they influence our behavior, and how we can identify strategies to avoid unintended discriminatory practices.

Our employees return from the State of Oregon Diversity and Inclusion Conference with a broader perspective of people's experiences, points of view, cultural differences and similarities, and the world in general.



State Library managers encouraged a higher level of attendance at this year's State of Oregon Diversity and Inclusion Conference, especially for new staff. We have ten staff registered for the 2016 State of Oregon Diversity and Inclusion Conference, and two on the waiting list.

On July 15, 2016, at least six of our employees attended the Oregon Library Association Support Staff Division Conference. Four employees attended a session entitled, "One of These Things is Not Like the Other – The Joy of a Diverse Environment." This session introduces some common errors in the way even the best-intentioned among us approach topics of diversity, some surprising study results conducted by a group of Columbia University researchers, and some ways that all of us can do a better job as we attempt to celebrate our individual differences while reaching for a common goal: that of creating a strong, inclusive library environment for everyone. Staff appreciated hearing about the unintentional errors we often make, the study results from researchers, and the additional references that were provided to learn more about diversity.

Additionally, five staff members attended a session entitled, "Responding to and Assisting People with Unique Needs." This session described the different groups of people that may visit our library and the resulting challenges that may arise, such as populations that have no other place to go. Staff heard helpful information about wording policies and guidelines so they are not offensive to any particular group, as well as how to remain respectful during interactions while maintain healthy boundaries. Those who attended this conference include a number of staff members that do not regularly attend trainings, making this conference very valuable.

One of our newer staff members attended a session at the Oregon Heritage Conference in May 2016 entitled, "Archaeology: Filling the Gaps on Ethnic History in Oregon." This session looked at different ethnic groups and their experience, using archaeology to collect information. It is important to tell the story of minority groups associated with the Oregon Trail and settlement.

A number of our employees attended the Oregon Library Association Conference in April 2016. One employee attended a few sessions that relate to diversity and inclusion, broadening our perspectives by considering the experiences of others. This staff member attended a session entitled, "Wayfinding: A Tale of Two Libraries," which explained ways for libraries to make themselves welcoming to all patrons, including signage, language, maps, and general visual appearance. Another session she attended was "When Others Tell Our Story: Librarian Portrayal in Film," which examined stereotypes, some positive and some negative, of the library profession in film. This employee also attended a session called, "Making Our Voices Heard: The Story of the OLA Support Staff Division," which reminded her of the variation in experiences of library support staff depending on where they work.

In May, 2016, our business manager attended a two and a half day training called, "Understanding the Dynamics of Organizations," which focused on understanding how people influence human behavior in the workplace. This training explored the practice of reframing, which is the ability to rethink and conceptualize a situation to widen one's perspective and available responses. This is a very important skill for managing people and projects in rapidly changing organizations.

All State Library staff members were required to attend a Communication and Conflict Resolution training in early 2016. The training session explored different communication styles and the most effective ways to communicate with people of differing styles. We plan to offer similar trainings every few years. Similarly, we developed a series of in-house trainings surrounding our updated customer service standards, which involves being open to using different methods of communication when necessary to work effectively with a variety of people.

When employees begin working at the State Library, they are required to read the agency's current Affirmative Action plan, in addition to a number of policies. These policies include our Affirmative Action and Equal Employment Opportunity policy, ADA and Reasonable Accommodation Policy (Statewide Policy 50.020.10), Discrimination and Harassment Free Workplace Policy (Statewide Policy 50.010.01), and Maintaining a Professional Workplace Policy (Statewide Policy 50.010.03). These policies are also posted on our Intranet for staff access. In addition, the following information is posted in hard copy on our staff bulletin board: ADA and Reasonable Accommodation in Employment, Employment Action Related to Communications of Employer about Religious or Political Matters, Your Rights Under USERRA, Equal Employment Opportunity is the Law, and information about Oregon Family Leave Act (OFLA) and federal Family and Medical Leave Act (FMLA).

Every State Library staff member meets with their program manager frequently (weekly for some, monthly for others). Our performance management system involves frequent check-ins regarding goals and training needs. Employees and managers work together to identify training needs, especially during the annual performance review, when new training goals are identified. Each employee is encouraged to accomplish a minimum of 20 hours of training per year, and records this in iLearn Oregon. Progress toward this goal is also discussed during the performance review.

Our Professional Development Workgroup consists of representatives from each division in our agency, in addition to a manager. This group is currently updating our Employee Training and Development Plan as well as improving our orientation materials for new employees.

Our agency recognizes the desirability of promoting career advancement and enrichment for employees. We give first consideration to qualified employees within the agency who apply for vacancies, as defined in the DAS/SEIU Collective Bargaining Agreement.

The State Library maintains the following five core values:

- **Open to opportunity:** We try new things, take smart risks, and ask “what if” to innovate and problem solve
- **Excellent customer service:** We learn from and respond to our users and co-workers so we can better deliver services to meet needs
- **Strong Community:** We compromise, cooperate, and connect to achieve mutual success

- **Professionalism:** We are honest, good stewards, keep our commitments, and are responsible for our actions
- **Personal leadership:** We take initiative, actively participate, and use open two-way communication to improve ourselves and our work environment

The agency director highlights one of these core values every quarter at our All Staff Briefings. This involves a PowerPoint presentation with an explanation of the value and some additional materials. These presentations are then posted on our Intranet for staff reference.

#### b. Volunteers

When a new volunteer begins at the State Library, the Volunteer Coordinator reviews applicable policies and plans with them, including our current Affirmative Action Plan, our agency's Affirmative Action and Equal Employment Opportunity policy, Discrimination and Harassment Free Workplace Policy (Statewide Policy 50.010.01), and Maintaining a Professional Workplace Policy (Statewide Policy 50.010.03). The Affirmative Action Plan is also shared with volunteers. Volunteers also receive training directly related to their volunteer duties, generally from the staff member(s) they will work with most closely. Our agency makes an effort to include volunteers in all-staff trainings and events, and plans to make this a higher priority going forward. We have not been in the practice of collecting demographic information about our volunteers, but are planning to explore the best way to gather this data. It will be useful for us to know more about our volunteers and how can we best support them as they donate their time to our organization.

#### c. Contractors/Vendors

We do not offer training to our contractors or vendors, as we do not frequently use such service providers. However, when we do work with a vendor or contractor, we make it clear that they need to follow state and federal laws when working with our agency. Additionally, our contracts include the following nondiscrimination clause related to subcontracts: "To the best of the undersigned's knowledge, Contractor has not discriminated against and will not discriminate against minority, women or emerging business enterprises certified under ORS 200.055 in obtaining any subcontracts."

### D. Programs

#### a. Internship Program

The State Library provides internships for students who are enrolled in library school or a relevant college program when our agency identifies a specific need for a project or task to help us carry out our mission and goals. This also provides useful work experience and opportunities to grow the library workforce. There are two categories of interns:

Unpaid: The intern is considered a volunteer for the State Library and will receive no pay for the work performed. The State Library will work to fulfill the library school curriculum requirements for the student to receive course credits.

Paid: The intern is paid for the work performed and is hired as a state temporary employee.

The State Library does not automatically offer employment within the agency after the internship is completed. The library plans to reach out to past interns who may qualify for positions when we have vacancies. We also plan to collect demographic data on our interns to assess our ability to reach a diverse audience. Additionally, we plan to look for interns to assist in areas other than library-specific work. For example, we may look for an intern to help with information technology, marketing, or other business functions. Offering a wider range of internship opportunities may assist us in reaching a wider pool of applicants.

#### b. Mentorship Program

The State Library does not have a mentorship program within our agency. However, our volunteers for Answerland, our virtual reference program, are each connected with a mentor at a participating library in Oregon.

#### c. Community Outreach Program(s)

The State Library works to strengthen our relationships with Oregon tribes. In December 2015, the State Librarian attended the Tribal State Government to Government Summit in Canyonville to listen and learn about the relationship between the tribal governments and Oregon state government. She also attended the Government to Government Education Cluster in March 2016 in Lincoln City and was able to network with tribal members and education professionals alike. The State Librarian also attended the Legislative Commission on Indian Services 2016 Spring Gathering and Training for State Agencies in Florence. Attending these events helps the State Library foster a valuable connection with tribal governments.

#### d. Diversity Awareness Program(s)

The State Library has a Library Advisory Council made up of representatives from each division, and the State Librarian. This group is advisory to the State Librarian, and acts as a forum for agency-wide staff ideas, issues, and concerns. At our most recent meeting, we agreed to serve as an employee resource group for agency-wide issues related to diversity, inclusion, equity, or affirmative action. Our Professional Development Workgroup can also be asked to identify training opportunities for our agency related to diversity, inclusion, equity, and affirmative action.

#### e. Leadership Development/Training Program(s)

The State Library does not have a formal leadership development/training program. When leadership training opportunities arise, interested staff members are encouraged to

attend. When an internal opportunity to lead a project or an event becomes available, managers encourage those with less experience to take on this role as a developmental opportunity.

#### E. Executive Order 16-09 Updates



**EXECUTIVE ORDER 16-09**

**RELATING TO AFFIRMATIVE ACTION AND DIVERSITY & INCLUSION**

On January 26, 2005, former Governor Kulongoski issued Executive Order 05-01, relating to affirmative action. That Executive Order directed Agency Directors and Administrators to review and discuss their affirmative action plans, to initiate training on affirmative action issues, to include affirmative action responsibilities in key job descriptions, and to conduct Cultural Competency Assessment and Training.

Since the issuance of Executive Order 05-01 and Amendment 08-18, many state agencies have met with the Governor's Affirmative Action Office (GAAO) to review and discuss their affirmative action plans. The Department of Administrative Services (DAS) has concluded an audit of position descriptions for the inclusion of affirmative action duties and DAS has shared audit results with GAAO. In addition, a number of state agencies have completed Cultural Competency Assessment and Training.

Despite these gains, much more can be accomplished. The State of Oregon remains committed to the right of all persons to work and advance on the basis of merit, ability, and potential. In order to continue implementation of the goals and policies set forth in Executive Orders 05-01 and 08-18, I extend these orders as follows:

**NOW THEREFORE, IT IS HEREBY DIRECTED AND ORDERED:**

1. The GAAO and each Agency Director and Administrator shall review and discuss each agency's affirmative action plan and affirmative action goals to identify resources for improving the hiring and developmental opportunities of underrepresented persons.
2. To continue the State of Oregon's progress in promotion of diversity in the workplace, as well as the elimination of the effects of past and present discrimination, intended or unintended, Agency Directors and Administrators shall:
  - a. Provide ongoing leadership in implementing each agency's affirmative action plan;
  - b. Ensure incorporation of affirmative action, diversity, and inclusion responsibilities in executive and/or management job descriptions, as appropriate;





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- c. Ensure that Affirmative Action Representatives attend GAAO's informational trainings to assist Representatives in fulfilling their affirmative action responsibilities;
  - d. Post each agency's affirmative action policy statement in a visible area. The policy statement shall include contact information for the agency's Affirmative Action Representative;
  - e. Communicate to all employees about the Affirmative Action resources available within each agency and the important role of Affirmative Action Representatives in responding to employees' concerns of discrimination in the areas of hiring, retention, promotion, and career development;
  - f. Evaluate and assess any trends showing an increase or decrease in discrimination and/or harassment claims; and
  - g. Work to improve implementation of the agency's affirmative action plan through the use of performance assessments and/or performance evaluations.
3. Under ORS 659A.012, state agencies are "required to include in the evaluation of all management personnel the manager's or supervisor's effectiveness in achieving affirmative action objectives as a key consideration of the manager's or supervisor's performance." Periodically, DAS shall conduct audits of agencies to determine whether management personnel are being evaluated based on effectiveness in achieving affirmative action objectives. Results of this audit shall be provided to GAAO.
4. GAAO will continue to coordinate with DAS in the development and presentation of training designed to improve employees' skills and competency in managing affirmative action and diversity issues.
5. GAAO will continue to monitor agencies' implementation of Cultural Competency Assessment and Implementation Services. Agency Directors and Administrators are strongly encouraged to utilize Cultural Competency Assessment and Implementation Services within their agencies if, in the opinion of GAAO and the Agency Director or Administrator, it is beneficial and appropriate for the agencies to do so.





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PAGE THREE

6. DAS, in conjunction with GAAO and the Oregon Department of Justice, has developed a confidential web-based exit interview survey tool. Agency Directors and Administrators shall allow employees to utilize state equipment to access the Exit Interview survey and shall encourage all employees to complete the survey prior to their transfer or departure.

7. This Executive Order will expire on December 31, 2020.

Done at Salem, Oregon, this 3<sup>rd</sup> day of May, 2016.



Kate Brown  
GOVERNOR

ATTEST:

Jeanne P. Atkins  
SECRETARY OF STATE





a. Respectful Leadership Training (Diversity, Equity & Inclusion)

The State Library does not call out respectful leadership training specifically, but we have periodically called upon the Employee Assistance Program to deliver helpful trainings to our staff. Our agency also highly values the sessions offered at the annual State of Oregon Diversity and Inclusion Conference.

b. Statewide Exit Interview

The State Library will be exploring the best way to gather exit interview data from separated employees. We may use the state's exit interview survey. Due to only having 42 positions, we do not have much turnover. However, we plan to collect this data to give us valuable information about working for our agency and the State of Oregon.

c. Performance Evaluations of all Management Personnel

The State Library currently has four manager positions – the State Librarian (PEMG), two program managers (PEMD), and a business manager (FA3). The State Librarian evaluates the performance of the managers annually, which incorporates staff feedback. Their evaluations provide feedback in six performance measure areas: results, customer service, team-building, effective communication, strategic thinking, and affirmative action. Measuring managers' success in the affirmative action area involves ensuring that employees are knowledgeable about AA/EEO, promoting a discrimination/harassment free workplace, identifying training needs related to diversity and inclusion, and fostering and promoting a diverse workforce and environment. Our agency plans to create more concrete and measurable goals in order to assess the manager's effectiveness in this area. The State Librarian's performance evaluation process is currently being updated by our State Library Board. It will include the State Librarian's progress toward diversity, inclusion, and affirmative action.

F. Status of Contracts to Minority Businesses (ORS 659A.015)

The State Library has awarded four contracts since July 2015, for a total of \$66,641.00. Two of those four contracts went to women-owned businesses: EdTech Strategies LLC, and Deborah Gitlitz, for a total of \$6,150.00. Therefore, just over 9% of our total contract amount was given to a minority, disadvantaged community, or women-owned business. It is a challenge for our agency to acquire larger contracts with such businesses, as we do not contract with companies frequently.

Contractor	Amount	Reason	Disadvantaged community
Coraggio Group	\$27,341.00	Purpose of the project was to gather information about the awareness of the Oregon State Library's services and customer needs from current as well as potential customers	No
Lyrasis	\$33,150.00	Setup, configuration and hosting of the digital asset management system	No
EdTech Strategies LLC	\$5,800.00	General consulting around E-rate in the state of Oregon	Yes - woman owned
Deborah Gitlitz	\$350.00	Providing early literacy instruction at the 2016 Focus on Children and Young Adults Institute	Yes - woman owned
Total	\$66,641.00		

### III. Roles for Implementation of Affirmative Action Plan

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#### A. Responsibilities and Accountability

The State Library Board provides direction with relation to our Affirmative Action Plan. The board seeks diversity in its appointments to advisory councils, considering protected classes as well as geographical diversity. The board wants to ensure that there are a wide variety of perspectives on the councils that serve as advisory to the board. These advisory councils include the following: Government Information and Library Services Advisory Council, Talking Book and Braille Library Advisory Council, and the Library Services and Technology Act Advisory Council.

##### a. Director/Administrators

As agency director, the State Librarian is responsible for directing work related to Diversity, Inclusion, and Affirmative Action. She also leads the effort to achieve the goals and objectives identified within our Affirmative Action Plan and monitors our progress. The State Librarian ensures that we comply with applicable federal and state laws, rules, regulations, and executive orders. She also ensures that performance reviews include evaluation of managers include efforts related to diversity, inclusion, and affirmative action.

##### b. Managers and Supervisors

The State Library has two program managers and a business manager. They ensure that new staff are familiar with policies and plans relating to affirmative action. One of our program manager positions is vacant, making it difficult for our remaining managers to focus on affirmative action goals. Whenever possible, they encourage staff to attend trainings, apply for openings, and develop leadership and communication skills. They also strive to maintain an environment free of

discrimination and harassment by enforcing policies, meeting with staff when issues arise, and encouraging training related to these issues. When hiring for a position, managers ask that the announcements be distributed widely, to reach more diverse groups.

#### c. Affirmative Action Representative

The Affirmative Action Representative is now the Executive Assistant who has only recently begun to attend the DI/AA/EEO meetings. She plans to bring back information about diversity, inclusion, and affirmative action to the agency. This person is also responsible for updating the Affirmative Action Plan. She encouraged the Library Advisory Council to explicitly state that diversity, inclusion, equity, and affirmative action issues that affect the agency can be brought to this forum. We also contract with DAS Enterprise Human Resource Services. Those we work with for recruitments ensure that we carry out agency recruitments in compliance with AA/EEO goals. The HR professional assigned to our agency can receive and investigate discrimination complaints in accordance with policies and complaint procedures, and can make recommendations to the State Librarian for appropriate action.

### **IV. July 1, 2015 – June 30, 2017**

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#### A. Accomplishments

The very broad goals that we created for the 2015-2017 Affirmative Action plan have not resulted in a more diverse workforce at the State Library. We do continue to provide local libraries with funding to pursue library programs and activities that will reach a wide and diverse audience as well as providing specific services for communities of color and people with disabilities. As noted in our goals for 2017-2019 we are re-energized and will be exploring achievable outcomes for affirmative action.

#### B. Progress made or lost since previous biennium

The passage of HB 3523 during the 2015 Legislative Session changed the configuration of the State Library Board. Two members were appointed by statute: the Chief Education Officer or designee, and the Director of the Oregon Commission for the Blind or designee. Additionally, two members were required to represent state government. We now have a member from the Department of Forestry and one from the Department of State Lands. We will also have an academic librarian on the board. This increase in diversity of our board has already been a tremendous asset.

The Affirmative Action Progress Report illustrates our progress toward our parity goal. This goal has been carried over for a number of years, and we do not know its origin. Ideally, the parity goal would be 0, and the diversity within our agency would mirror that of the labor force. This report also uses data generated from the state's personnel database (PPDB) which uses data from 1991. In the future, we hope to be able to pull data that is more current, to help us determine how to improve in the area of diversity.

This report measures the percentage of women, people of color (POC), and people with disabilities (PWD). The report shows us that we closer to our parity goal than we were in 2014. We have a good number of women in upper management, none in the computer analyst section, and a number of men in administrative support roles. We do not have many people of color or people with disabilities. We plan to advertise our positions more widely, to attract a wider range of applicants when we have vacancies.

OREGON STATE LIBRARY (54300)  
AFFIRMATIVE ACTION PROGRESS REPORT for June 30, 2016

STATISTICS - EEO CATEGORY - 6/30/16	TOTL EMP	MEN EMP	MEN %	WOMEN EMP	WOMEN %	WOMEN PARITY	WOMEN GOAL	WOMEN < GOAL	POC EMP	POC %	POC PARITY	POC GOAL	POC < GOAL	PWD EMP	PWD %	PWD PARITY	PWD GOAL	PWD < GOAL
A02 - UPPER MANAGEMENT (SR 31+)	3	0	0.00%	3	100%	37%	1.0		0	0%	12%	0.3	0.3	0	0%	6%	0.1	0.1
A OFFICIAL/ADMINISTRATOR	3	0	0.00%	3	100%				0	0%			0.3	0	0%			0.1
B10 - PERSONNEL/EMPLOYMENT	0	0	0%	0	100%	58%	0.0		0	0%	12%	0.0		0	0%	6%	0.0	
B12 - COMPUTER ANALYST	3	3	100%	0	0%	32%	0.9	0.9	1	33%	13%	0.3		0	0%	6%	0.1	0.1
B14 - LIBRARIAN/ARCHIVAL SPECIALIST	12	2	17%	10	83%	70%	8.4		2	17%	10%	1.2		1	8%	6%	0.7	
B15 - ACCOUNTING/FINANCE/REVENUE	2	1	50%	1	50%	53%	1.0		0	0%	13%	0.2	0.2	0	0%	6%	0.1	0.1
B16 - PROGRAM COORDINATOR/ANALYST	2	0	0%	2	100%	41%	0.8		1	50%	10%	0.1		0	0%	6%	0.0	0.1
B PROFESSIONALS TOTAL	19	6	32%	13	68%			0.9	4	21%			0.2	1	5%			0.3
F00 - ADMINISTRATIVE SUPPORT	17	6	35%	11	65%	70%	11.9	0.9	0	0%	10%	1.6	1.6	1	6%	6%	1.0	
F ADMINISTRATIVE SUPPORT TOTAL	17	6	35%	11	65%			0.9	0	0%			1.6	1	6%			
<b>TOTALS:</b>	<b>39</b>	<b>12</b>	<b>31%</b>	<b>27</b>	<b>69%</b>			<b>1.8</b>	<b>4</b>	<b>8%</b>			<b>2.1</b>	<b>2</b>	<b>3%</b>			<b>0.4</b>

**Target: 2015-17 Biennium Goal: 3.4**

The Oregon State Library (OSL) will continue to strive to maintain an under-representation of 3.4 for its Affirmative Action biennial goal. We will also continue to pursue recruitment techniques to more effectively reach and attract women, people of color (POC), and persons with disabilities (PWD) to help increase the applicant pool of qualified people. Despite our on-going efforts, the pool of qualified people of color and people with disabilities applying for our positions has remained very small. We have continued to achieve parity for women in the professional and management categories.

2015-17 Parity Goal Results	
AA Report Ending 6/30/2016	4.3 Does not meet target 3.4 parity goal
	4.7 Last report 6/30/14
	-0.4 Difference from prior report period

OSL Results		
Target 2009-11 Biennium Goal: 3.4	5	Not met; above parity goal
Target 2011-13 Biennium Goal: 3.4	4.7	Not met; above parity goal

## V. July 1, 2017 – June 30, 2019

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### C. Goals for OSL Affirmative Action Plan

1. To enhance our visibility and contacts with communities of color to aid in recruiting.
2. To participate in partnerships to increase interest in library careers.
3. To maintain our focus on developing a diverse and culturally aware staff.

### D. Strategies and timelines for achieving our goals

1. Enhance our visibility and contacts in communities of color to aid in recruiting. (July 2017 – June 2019)
  - Participate in partnerships to increase interest in library careers and scholarships for students of color. (July 2015 – June 2017)
  - Announce professional openings to state library agencies in other states to encourage people of color and people with disabilities to apply. (As vacancies occur)
  - Work with the state Governor’s Diversity & Inclusion/Affirmative Action Office and other small state agencies to promote the State of Oregon in general, and the State Library in particular as an employer of choice for job seekers. (July 2017 – June 2019)
  - Send notice of professional openings to national organizations of library professionals. (As vacancies occur)
  - Engage in outreach efforts, via e-mail or other means, to colleges and universities to recruit women, people of color, or persons with disabilities. (As vacancies occur)
2. Maintain focus on developing a diverse and culturally competent staff:
  - Promote and provide training opportunities for State Library staff to develop cultural awareness. (Quarterly, July 2017 – June 2019)
  - Promote celebration of events important to diverse cultures throughout the year. (On-going)
  - Increase cultural competency of State Library programs and services through assessment of programs and materials. (2017-2019)
  - Provide Library Services and Technology Act grants to help local libraries fund innovative projects to assess service needs, develop collections and reach out to diverse populations and encourage their use of local library services and interest in library careers. (July 2017 – June 2019)
  - Fund innovative projects to assess needs, develop adaptive technologies, and promote improved library services to people with disabilities. (July 2017 – June 2019)
  - Continue implementing Training and Development Plans for all employees. (On-going)

## **VI. Appendix A – State Policy Documentation**

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[http://www.oregon.gov/gov/policy/Documents/State\\_Affirmative\\_Action.pdf](http://www.oregon.gov/gov/policy/Documents/State_Affirmative_Action.pdf)

- G. ADA and Reasonable Accommodation in Employment (DAS No. 50.020.10)
- H. Discrimination and Harassment Free Workplace (DAS No. 50.010.01)
- I. Employment Development and Implementation of Oregon Benchmarks for Workforce Development
- J. Veterans Preference in Employment (105-040-0015)
- K. Equal Opportunity and Affirmative Action Rule (105-040-0001)
- L. Executive Order 16-09

## **VII. Appendix B – Federal Documentation**

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[http://www.oregon.gov/gov/policy/Documents/Federal\\_Affirmative\\_Action\\_TitleVII.pdf](http://www.oregon.gov/gov/policy/Documents/Federal_Affirmative_Action_TitleVII.pdf)

- A. Age Discrimination in Employment Act of 1967 (ADEA)
- B. Disability Discrimination Title I of the Americans with Disability Act of 1990
- C. Equal Pay and Compensation Discrimination Equal Pay Act of 1963, and Title VII of the Civil Rights Act of 1964
- D. Genetic Information Discrimination Title II of the Genetic Information Nondiscrimination Act of 2008 (GINA)
- E. National Origin Discrimination Title VII of the Civil Rights Act of 1964
- F. Pregnancy Discrimination Title VII of the Civil Rights Act of 1964
- G. Race/Color Discrimination Title VII of the Civil Rights Act of 1964
- H. Religious Discrimination Title VII of the Civil Rights Act of 1964
- I. Retaliation Title VII of the Civil Agency Affirmative Action Policy
- J. Sex-Base Discrimination Title VII of the Civil Rights Act of 1964
- K. Sexual Harassment Title VII of the Civil Rights Act of 1964

## **VIII. Appendix C – State Library Documentation Support of Affirmative Action Plan**

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In this section, we have included our State Library's Affirmative Action and Equal Employment Opportunity policy, our Employee Training and Development Policy, and our Customer Service Standards. Please note that both of the policies are out of date and contain old phone numbers and outdated information about our agency. The Employee Training and Development Policy is being updated currently, and the Affirmative Action and Equal Opportunity Policy is on our list to update in the upcoming year.

<b>Oregon State Library</b> Policy	
<b>Affirmative Action and Equal Employment Opportunity</b>	
Approved by: Jim Scheppke, State Librarian	Date: 8/1/10

**Policy Statement:** Oregon State Library (OSL) is committed to achieving equal employment opportunity and affirmative action objectives that will facilitate recruitment, employment and advancement of a diverse workplace. In administering its programs, the Oregon State Library will not discriminate against any person who seeks employment or is a current or potential user of State Library services based on race, color, religion, sex, sexual orientation, national origin, marital status, age, disability or any other protected class as defined by federal and state law.

**Authority:** ORS 243.305, ORS 659A, OAR 105-040-0001  
Executive Orders: 05-01 and 08-18

**Applicability:** All employees, volunteers, and Oregon State Library Board of Trustees **Attachments:** OSL Procedures for Reporting Inappropriate Behavior in the

Workplace **Definitions:**

Affirmative Action (AA): a method of eliminating the effects of past and present discrimination, intended or unintended, on the basis of race, color, religion, sex, sexual orientation, national origin, marital status, age, disability or any other protected class as defined by federal and state law.

Affirmative Action Plan (AAP): a strategic plan that describes the steps an agency will take to provide equal opportunity within its workforce.

Equal Employment Opportunity (EEO): the opportunity to obtain employment without discrimination based race, color, religion, sex, sexual orientation, national origin, marital status, age, disability or any other protected class as defined by federal and state law.

Equal Employment Opportunity Commission (EEOC): is the federal agency responsible for promoting and enforcing federal equal employment laws that make it illegal to discriminate against a job applicant or employee.

**Policy:**

The State Library Board of Trustees and management supports the spirit and the letter of equal employment opportunity laws, rules and regulations and affirmative action concepts and the right of all persons to work and advance on the basis of merit, ability, and potential.



As part of their performance evaluation, the State Librarian and managers will be evaluated, in part, on their efforts and accomplishments in promoting the respectful workplace, affirmative action and equal employment opportunity goals and objectives of the agency. Agency Teams are accountable to promote a respectful workplace, which honors diversity and promotes understanding and success for all employees.

The State Library remains committed to maintaining a team-based organization of inclusion with a positive work environment through on-going and equitable employee and team training and development opportunities.

As an equal opportunity employer, the State Library strives to eliminate the effects of past and present discrimination, intended or unintended, which are evident by analysis of present employment patterns and practices.

The State Library will assertively seek to attract qualified applicants from diverse backgrounds to improve the hiring opportunities of underrepresented persons. The best suited candidate selected for the position is the individual who meets the minimum qualifications of the position and best serves the need of the agency at the time the selection decision is made. It may not be the person with the highest score, the most experience, or the best education.

The State Library will continue its adherence to established nondiscrimination and affirmative action precepts in screening and selecting contractors and appointing advisory committee members.

The State Library will not discriminate or tolerate discrimination, against any employee because they are a member of, apply to be a member of, perform, has performed, applied to perform or have an obligation to perform service in a uniformed service.

An individual, who believes they were denied employment with the State Library based on any of the aforementioned discriminatory factors, may request a review of the decision by contacting the State Library's Affirmative Action Representative at (503) 378-3635.

An employee or volunteer who feels they have been harassed or discriminated against are encouraged to bring such behavior to the attention of agency management or the Affirmative Action Representative as outlined in the Oregon State Library Procedures for Reporting Inappropriate Behavior in the Workplace.

If the concern is not resolved to the satisfaction of the individual, they may contact the Governor's Affirmative Action Office (GAAO) Director at (503) 378-3544 or the Oregon Bureau of Labor and Industries (BOLI) in Salem at (503) 731-4075 ext 1 or in Portland at (971) 673-0761.

The State Library shall maintain a current copy of the Affirmative Action and Equal Employment Opportunity policy and Affirmative Action Plan on its website at: [www.oregon.gov/OSL](http://www.oregon.gov/OSL) to make it available for staff and volunteers to review, as well as to organizations served by the State Library.

<b>Oregon State Library Policy</b>	
<b>Employee Training and Education</b>	
Approved by: Jim Scheppke, State Librarian	Date: 8/1/10

**Policy Statement:** It is the policy of the Oregon State Library to support employee training and development priorities that relate directly to the State Library’s mission, goals, and vision.

**Authority:** DAS Policy: Employee Development and Implementation of Oregon Benchmarks for Workforce Development [50.045.01](#); [DAS/SEIU Collective Bargaining Agreement](#), Article 121.5 (Education, Training, and Development)

**Applicability:** All State Library employees

**Attachments:** Agency-Wide Training Plan, Training Request Form

**Definitions:**

*Competency* training includes but is not limited to knowledge or skills which help improve performance in one's current job such as software skills, job related technical and analytical skills, equipment use, applicable policies, organizational processes, cultural competence, and customer service skills.

*Career-related* training includes programs which develop readiness to assume new essential job functions or choose among job opportunities within state government.

*Team Development* training includes topics such as team building, communication, effective team meetings, facilitation, conflict resolution, performance measurement and problem-solving.

*Work Environment-related* training includes topics such as employee diversity, safety, organizational values, preventing harassment, and other programs to build understanding of state government or organizational culture and priorities.

*Appointing Authority:* State Librarian or designee.

**Policy:**

In order to achieve and maintain a highly effective and efficient organization that delivers quality customer service in a sustainable way, it is the policy of the Oregon State Library that employee training and development will receive the support and resources needed to ensure that each employee receives an effective orientation to their job and continues to receive a minimum of 20 hours of *Competency, Team, Career and Work Environment* related training each year. The Library remains committed to maintaining a team-based organization with a positive work environment through on-going and equitable employee and team training and development opportunities. The OSL Agency-wide Training Plan (Attachment 1) outlines the priorities, goals and objectives.

**Training and Development Priorities:**

Specific training and development priorities shall relate directly to the State Library's mission, goals, and vision. The training priorities for employees shall encompass competency, work environment-related, team development, and career-related training.

**Individual Employee Development Objectives:**

The employee and the Program Manager shall annually develop an individual Employee Training and Development Plan. The purpose of the plan will be to ensure continuous improvement in the employee's competence to perform a specific job, state government career, teamwork skills, and contributions to the work environment for the mutual benefit of the employee and State Library.

**Responsibilities:**

Program Managers: Coach staff to ensure that each employee has an up-to-date Training and Development plan, and that training opportunities are identified to complete that plan. Identify and communicate appropriate training opportunities for team members. Periodically review employee training activities to provide coaching and resources to carry out the development plan.

Human Resources Manager: Provide assessment, planning and direction for agency training efforts. Provide career development counseling to individual employees. Partner with Program Managers, other state agencies

and private providers to identify, coordinate or deliver appropriate training opportunities.

Library Administrative Services (LAS) Team members: Evaluate and report training statistics and outcomes to Management Team. Determine funding allocations for the Library's biennial budget to support the training plan. Establish and maintain procedures and systems for documenting, tracking, and reporting employees training.

Library Council: Monitor agency-wide training needs and proposes agency-wide training priorities and objectives, including the development and implementation of general skills training for all staff and new employee basic team training. Improve access to team building tools and resources, e. g. books, new information, exercises, problem solving, and facilitators and consultants. Monitor team functioning and agency climate through surveys and other tools and use results to make training and team development recommendations.

Team Coordinator and Team: Implement procedures for identifying, planning, requesting, approving and documenting training.

Team and Team Members: Develop an annual team training plan. Implement individual team member development plans. Monitor team training funds and data enter training hours into the iLearn system.

### **Approval Criteria for Training and Education request:**

Availability of budgeted funds;

Alignment with agency, team and position priorities and goals;

Ability to meet operating requirements while employee attends training;

Positive impact on team development and effectiveness;

Training is needed to improve effectiveness in the employee's present job; Training is needed because of changes and/or additions to the employees job duties;

Training is part of established career development goals that will benefit the agency.

### **Training Request Form:**

Submit completed registration form or confirmation of enrollment with the OSL Training Request Form (Attachment 2) to the Accountant in LAS for payment. Data enter training hours into the iLearn system.

### **Training and Education Budget:**

Training Funds will be allocated each Biennium between team budgets managed by teams and Program Managers.

The funds allocated in the training and education budget may be utilized in a variety of ways:

- to enhance on-the-job training
- to purchase training or development materials
- to design, develop and deliver training and development programs
- to send employees to external training or educational courses
- to register for library professional conferences and seminars (i.e., ALA, OLA, and SLA)

Examples of expenses which may be totally or partially allowed in compliance with state accounting rules:

- Registration fees
- Course materials except textbooks
- Salary, transportation, meals, and lodging for course participants. All travel requests are subject to State travel rules and approval by the State Librarian.

### **Continuing Education:**

To supplement on-the-job training and classroom training, employees may request leave and/or funding to attend education courses offered by accredited educational institutions. To be considered for funding, the employee must show that the training will benefit the Library, either through job improvement or career development within the Library or State government.

When an employee requests funding for continuing education a determination will be made by the Program Manager and appointing authority whether the Library will pay any portion of the cost. Major considerations will be the amount of training funds available, the priority of the training need, and the number of people requesting financial assistance. To be eligible for funding for continuing education:

- Employee must be a permanent, regular status employee.
- Employee must obtain prior approval in writing from their Program Manager and the appointing authority.
- Employee must successfully complete the course, as evidence, submit one or more of the following to their Program Manager and to the Accountant:
  - Documentation of a passing grade
  - Certificate of completion
- After completion of an educational course or program for which the State Library has provided any funding, the employee agrees to remain in State service for a period of at least six (6) months.
- Employee shall also agree that in the event he/she does not fulfill the six month commitment, he/she shall reimburse to the State an amount of any reimbursement proportionate to the unfulfilled portion of the commitment.

If one or more of the above criteria are not met, the employee may forfeit reimbursement, or may be required to repay any agency expenditures.

**Educational Leave:**

Employees may request leave without pay for continuing education. Such leaves may be granted by the Appointing Authority in compliance with the collective bargaining agreement and State policy.

## **Oregon State Library**

### **Customer Service Standards and Guidelines**

#### **Overview**

It is the goal of the State Library to provide uniform high-quality service to State Library customers and to colleagues. High-quality customer service includes:

- Responding to requests quickly
- Timely completion of tasks
- Professional and effective communication
- Operating with integrity
- Promoting accountability
- Assume positive intent

#### **Minimum Standards for All State Library Staff Members**

These minimum standards are the minimum expectation of all staff members. This section is followed by guidelines and suggestions for providing excellent customer service.

#### **Use of State Library communication tools**

- **Email**
  - Check email two (2) times per day at a minimum and respond to all queries within one business day. The response should indicate your progress/ability to complete the request. Use the X by Y or Notify process to clarify expectations for completing requests as needed.
  - Use the out-of-office auto-reply email option and coordinate with other division members for email management when unavailable.
  - Keep customers informed when referring emailed questions to other staff.
  - To ensure that recipients can respond to messages easily, use a signature block that at a minimum includes: Name, Title, Phone Number, Email Address.
- **Telephones/Voicemail**
  - Answer phone call when you are available during work hours.
  - Answer call indicating the agency's name and your name.
    - Example: Hello. This is Jane Doe from Library Support at the Oregon State Library.

- At a minimum, the voice mail message should include Name and Agency Name, your inability to take the call, and instructions for leaving a message so a call can be returned or press 0 if that option is available.
    - Example: This is Jane Doe from the Oregon State Library. I'm away from my desk at the moment. Please leave a message and I will call you back.
  - Check voicemail a minimum of two (2) times per day and respond to all queries within one business day. The response should indicate your progress/ability to complete the request. Use the X by Y or Notify process to clarify expectations for completing requests as needed.
  - If you are going to be away for any amount of time that will not allow you to return the call within one business day, your voicemail greeting should indicate the length of your absence and an alternative option for the caller.
    - Example: This is Jane Doe from the Oregon State Library. I will be away from the office May 1-4. Please leave a message and I will contact you when I return, or press zero to speak to another library staff member.
  - Follow established division procedures for how to update voicemail greetings for absent colleagues.
  - Maintain adequate space in your voicemail box for incoming messages.
- **Instant Messaging (IM)**
    - Log into the IM tool during working hours.
    - Use status settings to indicate periods of unavailability.
    - Respond promptly when receiving a message from another employee.
  - **Outlook Calendar**
    - Use Personal Outlook Calendar to list meetings, leave, work schedule, and other obligations impacting availability during work hours.
    - Use meeting invitations to schedule meetings with colleagues.
    - Respond to all meeting invitations within one business day.
    - Offer alternative meeting times when you are unable to accept a meeting request or work with the meeting convener to explore alternative options for participation.
    - When going out of office make adjustments to meetings already scheduled.

## Meetings

- When convening a meeting, ensure that all the appropriate people are invited to the meeting.



- ◉ Make an agenda available to all participants before the meeting.
- If you have agreed to attend a meeting but later find that you cannot, inform the convener or someone else scheduled to attend the meeting. Work out alternatives for giving and receiving information, as appropriate.
- Be on time for meetings.
- If the meeting will run longer than the scheduled time, clarify participants' ability to continue.
- Review decisions and follow-up items at the close of the meeting so everyone is clear on the meeting's outcomes and next steps.
- To ensure that all participants remain informed of activities, the convener (or a designee) should record ideas, decisions, and action items and distribute these notes to all participants within five business days.
- The convener may contact participants who were expected but not present to follow up. It is also the responsibility of the absent participants to seek out information that was missed.
- Be prepared for the meeting

### **Guidelines and Suggestions for High-Quality Customer Service**

This section further defines and explains concepts of high-quality customer service and can be used to assist staff as they work towards meeting customer service standards of the agency.

#### **General**

- Make service to library customers and each other a priority by making yourself available to all customers and colleagues. Business calls, meetings, and emails are not interruptions to your job; they *are* your job.
- Stay informed about all State Library services so questions may be accurately routed to the best staff member or resource.
- Understand customer or staff needs at the time of contact. Ask questions to make sure needs are understood and expectations for completing the request are clear. This practice will help assure timely responses and accurate referrals to appropriate staff members or resources.
- Keep customers and colleagues informed on your progress if you cannot immediately answer a question or complete a task within the time frame that was agreed to. Use the X by Y or Notify process to ensure accountability. (Described on page 6)
- Make sure encounters with customers and colleagues are positive by being courteous, pleasant, and professional.
- Maintain a consistent, courteous demeanor and tone in all communications.

## **Professional conduct**

Professional conduct in the context of the State Library's Customer Service Standards includes exhibiting a courteous, respectful, conscientious, and generally competent manner in the workplace. It also includes general awareness and adherence to the [\*Code of Professional Ethics of Librarians\*](#). Relevant elements of this code include:

- Providing the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.
- Protecting each library user's right to privacy and confidentiality with respect to information sought or received and resources consulted, borrowed, acquired or transmitted in accordance with Oregon law.
- Treating co-workers and other colleagues with respect, fairness, and good faith, and advocate conditions of employment that safeguard the rights and welfare of all employees of our institutions.
- Distinguishing between our personal convictions and professional duties and do not allow our personal beliefs to interfere with fair representation of the aims of our institutions or the provision of access to their information resources.
- Striving for excellence in the profession by maintaining and enhancing our own knowledge and skills, by encouraging the professional development of co-workers, and by fostering the aspirations of potential members of the profession.

## **Professional Communication**

Professional communication is a key element in high-quality customer service. Please consider these suggestions for promoting professional communication in the workplace.

- Use clear and concise language when presenting ideas
- Logically and completely present ideas and try to stay on topic
- Always consider the purpose of your communication and think about your audience's perspective
- Actively listen to other's ideas and question them for further clarity
- Show enthusiasm about what you are talking about and use a strong, active voice

- Be friendly, polite, respectful and confident
- Allow for each member of a group to voice their opinion
- Avoid jargon, acronyms and buzzwords
- In oral communication, be aware of the tone and pitch of your voice. Strike a friendly and sincere tone. Prepare your ideas in advance to assure clarity
- In written communication, use a style of writing that is easy for the reader to read such as bullet points and small paragraphs
- Arrive at meetings a few minutes ahead of time to ensure meetings start on time.
- Participate in discussions during meetings as appropriate. Ensure all participants have an opportunity to contribute to discussions.
- Speak up if the meeting is getting off track and not accomplishing stated goals.
- Forward calls to the appropriate service or person once you understand a customer's needs. Whenever possible, check the availability of the service/person before forwarding a call, and inform the customer they are being transferred.
- Use a courteous and professional tone during all phone calls and voicemail greetings.
- Clearly indicate when an IM conversation is complete.
- Ensure readability of email messages by minimally using non-standard colors, backgrounds, fonts, and images.
- Proofread messages to assure clarity and professionalism.
- Share Outlook Calendar with staff members you work with closely and with others as needed.

## **Courtesy**

Courtesy is expressed as a wide range of respectful behaviors and positive attitudes. Personal characteristics and behaviors that are commonly identified as courteous include:

- A willingness to discover opportunities to exceed the customer's expectations
- Sincerity
- A friendly smile (even over the phone)
- A neat appearance
- Clear and understandable use of language
- Exceptional listening skills (attentiveness)
- A relaxed and natural tone of voice
- Appropriate eye contact
- Clear communication at the customer's comprehension level
- Knowledge and/or interest in the topic of conversation

## **Giving Feedback**

Good customer service among staff requires honest and open communication. Providing feedback to colleagues is an effective method for promoting communication. Use these concepts when formulating and receiving feedback.

- Think through your feedback first. Thoughtful and well articulated comments are more likely to be considered and found to be helpful
- Be specific and use examples
- Be constructive
- Make requests; not demands
- Address actions; not attitudes
- Be sensitive
- Invite the other person to share their view
- Listen openly
- Check for understanding
- Be aware of your emotions
- Don't interrupt to argue, correct, or defend
- Analyze the information
- Take time to think about the information to see what you can gain from it

## **Promoting Confidence**

Effective customer service relies on healthy workplace relationships. It is easier to provide high-quality customer service when colleagues have confidence in one another. Elements of confidence include:

- Be aware of different communication styles, personal background, work history, etc. when interacting with staff and customers
- Consider the perspective of the colleague or customer making a request
- Pay attention to the little things that promote or can undermine friendly interactions, such as negative body language, active listening, etc.
- Clarify expectations to prevent misunderstandings
- Keep all commitments and promises or directly communicate inability to do so; collaborate on finding solutions and alternatives
- Show integrity (walk your talk)
- Apologize when warranted
- Openly and respectfully discuss problems and work toward solutions
- Support decisions once they are made
- Take the initiative to make things better

## **X by Y or Notify**

X by Y or Notify is a method for communicating expectations about the completion of work. Agree to do **X** by a given time **Y**. **Notify** if the work cannot be completed. For example:

I will try to get that document to you by 5:00 today, or I will let you know if it takes longer.

When agreeing to work commitments, remember to:

- Negotiate time frame and priorities when you initially make a commitment. Renegotiate when needed, establishing a new time frame and clear understanding of revised priorities or expectations.
- Be sure there is mutual understanding between you and the colleagues making the agreement. To assure mutual understanding, restate the agreement and seek a verbal or written acknowledgement.
- Be clear about your ability to fulfill the commitments and be specific about the tasks that make up the commitment.
- Keep track of what you have committed to do to help manage your workload
- If you are unable to meet your commitment, let your colleagues know (i.e., Notify). Offer a revised X or Y and renegotiate your agreement.
- Communicate openly about roadblocks keeping you from completing your work. This will reduce any stress or misunderstandings among you and your colleagues.

Adapted from:

- Customer Service Policy (2010)
- New Employee Orientation training materials
- [Information Asset Use, Implementation, and Security Guidelines](#)
- [World-Class Courtesy: A Best Practices Report](#)