



STATE OF HAWAII  
BOARD OF EDUCATION

## STATE LIBRARIAN 2017-2018 ANNUAL PERFORMANCE EVALUATION

On October 18, 2018, the Board of Education (“Board”) completed its evaluation of State Librarian Stacey Aldrich for School Year 2017-2018 using the Excluded Managerial Compensation Plan (“EMCP”) form. The state librarian oversees library services, collections, and programs that fulfill the mission of the Hawaii State Public Library System (“HSPLS”). The position is responsible for the operation, planning, programming, and budgeting of all public libraries within the state.

The Board of Education (“Board”) evaluates the State Librarian using the following rating scale.

<b>Exceptional</b>
Exceeds Expectations
Fully Meets Expectations
Needs Improvement
Unsatisfactory

The overall rating is based on ratings in two areas: (A) overall management abilities and (B) attainment of performance objectives and program accomplishments, based on three objectives, set forth in further detail below.

**Overall Rating:**  
Exceptional

**(A) Overall Management Abilities:**  
Exceeds Expectations

**(B) Performance Objectives and  
Program Accomplishments:**  
Exceptional

Overall Rating

Exceptional

The overall rating is based on the evaluation of the State Librarian’s (A) overall management abilities and (B) attainment of performance objectives and program accomplishments.

**Comment:** The Board has completed the annual performance review of the State Librarian for the 2017-2018 School Year and is impressed with her performance. The State Librarian goes beyond standard management expectations by setting high expectations, supporting staff, and continuously looking for ways to use existing resources more efficiently. The State Librarian has demonstrated her commitment to moving forward in a nimble and responsive manner that is fitting of a future-thinking and innovative public library system. She understands that staff are the heart of the public libraries and continues to dedicate time and resources toward supporting them so that they can provide quality service to Hawaii's communities. The State Librarian pushes on the boundaries of innovation and is willing to take calculated risks to implement projects that can result in system efficiencies. She values feedback and conversations with staff and patrons alike and pairs this knowledge with innovation to build and sustain foundations that make our public library system responsive to patron and community needs. Based on an evaluation of the State Librarian's overall management abilities and performance objectives and program accomplishments, the Board is issuing an overall evaluation rating of Exceptional.

**(A) Overall Management Abilities**

**Exceeds Expectations**

The criteria which measures overall management is based on the following factors:

- Strategic planning/organizing and managing work
- Leading and managing change/flexibility/innovation
- Developing a successful team/managing human resources
- Budget formulation and fiscal management
- Problem solving/decision making and technical know how
- Customer focus/client orientation
- Communication
- Building partnerships
- Interpersonal skills
- Self-starter

**Comment:** The State Librarian goes beyond standard management requirements by consistently striving to improve our public library system and setting high expectations for herself, her leadership team, and staff statewide. She works to ensure that staff is properly supported when they are asked to reach beyond current expectations and has also kept an eye on efficiency by using existing resources to do more whenever possible. The Board notes the following:

- The State Librarian developed a system where her leadership team identifies strategic projects that focus on supporting the growth of the system and then allows each leadership team member to take the lead on specific projects. Examples of these projects include identifying competencies for library staff in order to develop tailored staff training, improving buildings, starting discussions with staff on collection development, and working with partners to create new services and programs to support our communities.

- Over the past year, the State Librarian's leadership team has experienced major staffing changes. She and her staff have overcome the challenges of staffing changes through a combination of structure and flexibility. Establishing a set way of meeting and communicating provided structure. This structure established norms that allowed staff to be flexible, working as a team and stepping up to take on and learn new tasks.
- Recognizing that the allocation of work to positions and distribution of work throughout the system was creating challenges, the State Librarian started conversations about restructuring to help the system to function more efficiently.
- The State Librarian has a hands-on approach to managing human resources. When there is a situation, she meets with staff personally to get feedback and develop a solution. Moreover, she takes to heart the needs of staff, not only professionally, but emotionally and strives to support them in all aspects.
- The State Librarian's hands-on approach extends to patrons. She answers online feedback and takes direct calls from patrons. She does this because libraries are here to serve their communities and her job is to understand patron needs and find new ways to serve patrons better.
- The State Librarian has been successful in focusing on funding in high-impact and essential areas, including obtaining legislative appropriations for staffing the new Nanakuli Public Library, more money for collections, strategically maintaining infrastructure and buildings, and providing new community services, such as public notary services. In addition to prudent monthly management of the budget, she has initiated and implemented ways to improve and manage the HSPLS budget more efficiently. For example, she worked with human resources to strategically rethink and change its current processes regarding temporary assignments and the hiring of substitutes in accordance with the applicable collective bargaining agreements. The redesign simplified the system and resulted in saving thousands of dollars that could be used for hiring permanent staff and facilities.
- The State Librarian believes in the power of her staff, their ability to work through issues, and create their own solutions. She challenges them, and they answer the call. For example, staff figured out how to customize the Integrated Library System's ("ILS") Acquisitions module to work with the existing decentralized material process. Their creativity resulted in the elimination of manual reconciliation of costs and allowed for the strategic purchase of materials across branches while using an existing, but underutilized resource.
- The State Librarian has dedicated a large percentage of her efforts to creating and building partnerships with her colleagues, customers, constituents, and stakeholders, which have helped to promote library services and build connections with the communities they serve. These highly visible partners include, but are not limited to,

Public Broadcasting Service (the Great American Read); Consolidated Theaters (book discussions before movie showings; Ms. Hawaii 2018 (reading and library platform; Helping Hands Hawaii, U.S. Department of Veteran Affairs, State Homeless Coordinator (supporting challenges of people that are unhoused); Hawaii Book and Music Festival (annual event); Hawaii Department of Education (Summer Reading Program and library cards for students); Hawaii International Film Festival (movie making contest).

**(B) Performance Objectives and Program Accomplishments**

**Exceptional**

The performance objectives and program accomplishments are jointly determined at the beginning of the evaluation period by the Board and the State Librarian. At the beginning of the evaluation period it is determined: (a) what weight each objective will be afforded, (b) how the results will be evaluated, and (c) the significance of attaining or failing to attain each of the specified results. These performance objectives and program accomplishments are then assessed at the end of the evaluation period. The performance objectives and program accomplishments are evaluated based on the difficulty, skill and effort levels of each objective.

**Comment:** As noted above, the State Librarian sets high standards, and the objectives she and the Board developed for the 2017-18 School Year were ambitious and challenging. The objectives are described below.

**Objective #1 Create a new strategic plan for HSPLS**

A strategic plan helps to guide the work of an entire system toward agreed upon goals. HSPLS's mission of nurturing a lifelong love of reading and learning is essential to education, industry, and thriving, engaged communities in this state.

**Comment:** There is less emphasis on the significance on the achievement of this objective by stated timelines, as originally provided, because the Board found that the true value demonstrated by this objective was the response of the State Librarian to circumstances and challenges, the incorporation of newly acquired knowledge, and continuing to provide strategic guidance to the organization while navigating and managing these challenges. Originally, the State Librarian proposed a timeline where a consultant was hired and the design and stakeholder engagement portions of the process were scheduled to be completed by June 2018. However, there were several events and situations that necessitated an adjustment to these timelines. These occurrences are described in further detail below. The Board sees these adjustments as a nimble response to address a fluid and dynamic situation that will ultimately better meet the needs of the public library system and Hawaii's communities.

In the face of substantial challenges, the State Librarian has kept the public library system moving forward in a strategic manner by communicating a framework to staff and the

community that will also provide the foundations for building the next strategic plan in this upcoming year. The Board notes the following:

- The HSPLS's leadership team experienced substantial turnover with half of the team members changing over the past year due to retirement, illness, and personal reasons. The State Librarian recognized that the successful implementation of a strategic plan requires investment and ownership by the organization and its employees, which all starts with the organization's leadership team. As such, the State Librarian has wisely paused further development of a strategic plan until a leadership team is firmly in place.
- The State Librarian has also taken to heart what she learned as a participant in Pono Shim's Aloha Response program, particularly that HSPLS needs to more clearly define its service philosophy. The service philosophy serves as the core of HSPLS's framework, and the State Librarian wants to engage in meaningful dialogue and discussion with her staff at statewide Institute Days in early 2019 to work on identifying and further defining this service philosophy core.
- The State Librarian has led and participated in many strategic planning processes and has identified the need to move toward building strategic maps that help an organization understand its priorities and focus, while also being dynamic and flexible, and to allow the organization to meet the ever-changing needs of its patrons and the communities it serves.
- The State Librarian has put in place a framework with focus areas to continue to guide the organization while the leadership team is assembled, the service core is constructed, and the strategic plan is developed. The focus areas are designed to cover to the basis for everything for which the organization is responsible: people (staff and stakeholders), place (physical spaces), collection (what libraries bring together for community to share), services and programs (what libraries provide that support the needs of the community). This framework will also serve to guide work while the full strategic map is developed.

## **Objective #2 System wide staff training plan**

Libraries strive to provide quality service to patrons and communities statewide. Consistent, statewide training ensures that staff can provide the public with a consistent level of service in all 51 branches.

**Comment:** The State Librarian has been developing a strategic staff training system that is relevant, consistent, and regularly reviewed and analyzed. She also has been working with staff to create core competencies that will be used in the future to identify needed training areas, establish consistent training methods, and creating a position that will be responsible for organizing and coordinating a system-wide training program. She has made significant progress in this area, and the Board is confident that she will fully implement this important system and

believes that it will help support library staff and improve patron experience. The Board notes the following:

- The State Librarian has been working with all 51 branch managers to develop competencies for each position at all branches. Competencies for all positions, except support staff, have been fully established. Once this process is complete, these competencies will be used to identify or create training opportunities to support all positions.
- Three (3) official training methods were established. The first, face-to-face training, has been used for new, large, system-wide changes like the implementation of the ILS Acquisition module for ordering and managing collection budgets, which is mentioned above. The second, synchronous webinars, are used for simple trainings that relate to updates, minor processes and procedure updates, and the introduction of new products or services, such as training for the Summer Reading Program. The third is a new online platform, Niche Academy, which used to collect and share standardized training with both staff and patrons in one location. Niche Academy has been used to provide learning videos so staff and patrons could learn how to use apps to track reading minutes for the Summer Reading Program (Beanstack), the program that allows patrons to read new stories nationally and internationally (PressReader), and the program that provides test preparation, college planning, financial aid tools, and career development (Testing and Education Reference Center).

### **Objective #3 Improve efficiencies in the use of library resources**

Providing quality service with finite resources requires a constant examination of resources and evaluation of community needs to see if there are innovative ways to improve efficiency. The first pilot project looked to address staffing shortages that could possibly lead to the closure of library branches. It utilized roaming positions that could be reassigned to branches that needed staff to stay open. The second pilot project outsourced material processing so that staff could focus more on improving patron services and programming.

**Comment:** The two pilots projects were initiated. The roaming position pilot project was implemented on Hawaii Island, and data is being collected as to the impact of the project. The outsourcing of material processing was implemented, but during the process staff identified areas that provided opportunities for improvement. The Board recognizes that with innovation comes risk and responsibility and that a lot of the learning comes from the challenges we encounter and not just the success achieved. The Board appreciates the State Librarian's willingness to explore new and innovative ways to address the issue of finite resources and build a forwarding moving organization focused on improving its operations and services. The Board notes the following:

- The roaming librarian position faced challenges in hiring, but the implementation of a roaming janitorial position was started on Hawaii Island. Once there is more data, the

State Librarian will evaluate the position and its impact. Another recruitment process has begun to try to permanently fill the roaming librarian position. The Board looks forward to learning whether this pilot project is successful and whether it addresses the issue of staff shortages.

- The Nanakuli Public Library, which opened in 2018, used a vendor to outsource the processing of all new materials added to its collection. Implementation was not smooth, but it provided a valuable learning experience that will help to advise future efforts to process material. The State Librarian is working with staff and the vendor to see if the issues can be addressed and overcome for potential future efforts to process materials. More importantly, the project made it clearly evident that more dialogue and discussion is needed around system-wide material processing in order to increase efficiencies and reduce costs.