TEXAS STATE LIBRARY
AND
ARCHIVES COMMISSION

TOOL BOX

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Introduction

The Tool Box is the culmination of an Organizational Assessment project for the four library systems, supported by the Friends of Libraries & Archives of Texas through the Texas State Library and Archives Commission (TSLAC). TSLAC engaged **Lee+ Associates** to perform Organizational Assessments for each library system to assess their current level of operational health and provide specific recommendations for improvement. This Tool Box was designed to assist member libraries in each system with continued self-evaluation and learning towards improving operational effectiveness.

About the Tool Box

Basics
The Tool Box has 9 main sections as follows:
1. Governance
2. Human Capital Management
3. Technology
4. Marketing and Communications
5. Data Collection, Management, Analytics
6. Budgeting and Finance
7. Administrative Systems
8. Fundraising
9. Makers Spaces

Each Tool Box section has specific topics with corresponding resources. Resources will be online (a link is included) or a document(s), which will be included in the Appendix. The column to the far right will denote a level, which indicates the recommended resource based on the library's Organizational Lifecycle Score. A quick guide to determine your library's score is included in the following section.

Updates
This Tool Box is a living document and to keep it relevant, it will require updates. We recommend that a Tool Box Committee is created with two representatives of each Consortium. They will review recommendations for addition or deletion of resources, make necessary updates to the main document and publish it in a centralized system for easy access by all. Meetings can occur quarterly and remotely using online meeting technology.

- **Directories**

Each Consortium is to ensure that a contact list for each library is updated and submit to Tool Box Committee. The list would be published in a centralized system.

- **Vendor lists**

Each Consortium is to ensure vendor lists are updated and shared so other libraries can benefit from vendors who have provided outstanding services or programming. It would be beneficial to provide a rating after each vendor to facilitate selection. The vendor list would be published in a centralized system.

Organizational Lifecycles

Organizational Lifecycles are widely used in the business world to help organizations identify opportunities for increased operational effectiveness. There are five basic cycles in traditional models:

1.) **Level 1: Start up** – Loosely structured organization with minimal processes and rudimentary systems. May have a Governance or Advisory Board, but duties are not clearly defined. May or may not have a Friends Group. Few staff with no written HR policies or workplace rules. Library has minimum staff. Attends Consortium eagerly and regularly.

2.) **Level 2: Adolescent** – Basic structure and systems in place with emerging HR and operational polices adopted. Have a Board and Friends Group in place but need clarity around roles and responsibilities. Programs are beginning to be established with good attendance. Have staff to manage most duties. Have basic understanding of operations planning and may have started thinking about strategic planning. Regular participant in Consortium meetings and sharing information.

3.) **Level 3: Mature/Sustainability** – Major structures and systems in place. Have a functioning Board and Friends Group who coordinate efforts and fundraise effectively. Have staff with specific skills to handle distinct jobs. All needed policies and procedures are in place and updated. Best practices are researched and followed. Has established programming with robust attendance and have engaged in some form of strategic or operational planning. Well-established Consortium member and may provide leadership at this level.

4.) **Level 4: Stagnation & Renewal** – Systems are beginning to deteriorate, and procedures are not followed. Staff turnover and disengagement is high, and programs are not attracting patrons. Board and Friends Group also lack engagement and apathy has begun to emerge. Capacity building is needed to re-invigorate leadership and staff, programs and processes. Robust strategic planning, clear operational goals,

restructuring, increased market awareness, and reinvigorating vision and mission are needed. Infrequent participation in and attendance to Consortium meetings.

ˈ Ö ˈ : D – Departure from systems and processes to putting out fires constantly. Poor internal controls and major disagreements between Board and library leadership. Programs are unsustainable due to high staff turnover and patron participation. Barely functioning Board and Friends Group. Has not attended Consortium for some time and does not keep up with best practices. Immediate course correction is necessary, or library runs risk of closure. _Board, Library Leadership, Friends Group, and Hiring entity (City or County), must meet to plan and determine Library's viability._

Declining Library
If a library is exhibiting signs of decline, it is important to address the issues quickly to avoid further decline. Enlist the aid of outside counsel, if necessary, to assist with identification of root causes and determination of immediate action steps to mitigate issues.

Determining individual Library Lifecycle Level
Referring to the Organizational Lifecycle Grid, read each statement under each column and circle the one(s) that most apply to your library. Then, evaluate in which columns you have the most selections, which will determine the level(s) of concentration for your library. However, to ensure a solid operational structure is in place, we recommend you go through all level 1 and Level 2 items and have these elements solidly in place.

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