



City of Salem

CITY OF SALEM AND SALEM URA FINANCE COMMITTEE MEETING AGENDA

February 17th, 2026 4:00 PM

Hybrid: ZOOM/Parkway Building, 440 Church St. SE, 4th Floor, RM PA4-307*

View Via YouTube: https://www.youtube.com/channel/UCQLj9RKZNHu4wfYcs_TC0TA

Si necesita ayuda para comprender esta información, por favor llame 503-588-6274

PARTICIPANTS

Board Members

Councilor Deanna Gwyn, Chair
Councilor Paul Tigan
Mayor Julie Hoy
Councilor Vanessa Nordyke
Alternate-Councilor Shane Matthews

Staff

Krishna Namburi, City Manager
Dan Atchison, Deputy City Manager and City Attorney
Josh Eggleston, Chief Financial Officer
Courtney Knox Busch, Assistant City Manager/Director for Strategy and Engagement
Gretchen Bennett, Community Services Director
Kali Leinenbach, Budget Manager
Jeremy Morgan, Financial Reporting Manager
Kelli Blechschmidt, Management Analyst II
Shengnan Thomas, Administrative Analyst I

Guests

Ryan Pasquarella, REDW
Tammy Lohr-Schweitzer, Baker Tilly
Maria Stroth, Baker Tilly
Eva Jungreis, Baker Tilly

AGENDA

1. Welcome and call to order

2. Approval of Minutes
 - a. December 15, 2025 (Package page 3)
3. Public Comment - Appearance of persons wishing to address the Board on any matter other than those which appear on this Agenda
4. Action Items
 - a. None
5. Management Update/Information Items
 - a. REDW Presentation of City of Salem ACFR and Salem URA Annual Report (Package page 5)
 - b. Baker Tilly Presentation of Performance Audit Program Update and Library Performance Audit (Package page 17)
 - c. Enterprise Leadership Performance Audit Update (Package page 73)
6. Continued Business
 - a. None
7. New Business
8. Adjourn

*During Civic Center seismic improvements, the in-person portion of the hybrid meeting will take place in the Parkway building located at 440 Church Street SE. When entering from Bellevue St SE, take the first left and continue straight into the parking lot. You will enter the building and follow signage to the elevator and select the 5th floor. Staff will come to greet you and bring you to the meeting room which is located on the 4th floor.

Next Scheduled Meeting: March 16th, 2026

This meeting is being conducted in-person with the options to participate remotely. Interested persons may view the meeting online on [YouTube](#). To sign up to testify or to submit public comment, contact the Finance Department via email at finance@cityofsalem.net or telephone at 503-588-6040 the day of the meeting by 1PM.

Special accommodations are available, upon request, for persons with disabilities or those needing sign language interpretation, or languages other than English. To request accommodations or services, please call 503-540-2371 (TTD/TTY 503-588-6439) at least two business days in advance.

It is the City of Salem's policy to assure that no person shall be discriminated against on the grounds of race, religion, color, sex, marital status, familial status, national origin, age, mental or physical disability, sexual orientation, gender identity, and source of income, as provided by Salem Revised Code 97. The City of Salem also fully complies with Title VI of the Civil Rights Act of 1964, Americans with Disabilities Act of 1990, and related statutes and regulations, in all programs and activities.

CITY OF SALEM AND SALEM URA FINANCE COMMITTEE

Minutes

DATE: Monday, December 15, 2025

PLACE: ZOOM / Parkway Building (440 Church St SE, RM PA4-307)

CHAIRPERSON: Deanna Gwyn

STAFF LIAISON: Josh Eggleston, CFO 503-588-6130 JEggleston@cityofsalem.net

Members Present:

Councilor Deanna Gwyn, Chair
Mayor Julie Hoy
Councilor Vanessa Nordyke
Alternate-Councilor Shane Matthews

Members Absent:

Councilor Paul Tigan

Staff Present:

Dan Atchison, City Attorney
Josh Eggleston, Chief Financial Officer
Brian Martin, P.E., Public Works Director
David Gerboth, Fire Chief – virtual
Gretchen Bennett, Acting Community Services Director
Kali Leinenbach, Budget Manager
Allen Dannen, P.E., City Engineer
Tammi Starrs, PW Program Manager
James Wharton-Hess, Senior Fiscal Analyst
Shengnan Thomas, Administrative Analyst I

Guest Present:

Councilor Linda Nishioka as a member of the public

1. CALL TO ORDER: 4:02 PM / Quorum

2. APPROVAL OF COMMITTEE MINUTES
 - a. November 17, 2025
Motion to approve the November 17, 2025 meeting minutes was moved by Alternate Member Matthews, seconded by Member Julie Hoy, and carried by the following vote:

Aye: Unanimous
Nay: None
Abstentions: None

3. PUBLIC COMMENT
 - a. None

4. ACTION ITEMS

- a. None

5. MANAGEMENT UPDATE / INFORMATION ITEMS

- a. Capital Improvement Plan (CIP) Update

Tammi Starrs, PW Program Manager presented CIP update to committee members.

Questions and comments: Member Julie Hoy and Alternate Member Matthews

Answers and explanations: Josh Eggleston, Chief Financial Officer

6. CONTINUED BUSINESS

- a. Forecast Factor Discussion

Josh Eggleston, Chief Financial Officer presented FY 2027 – 2031 forecast factors to committee members.

Questions and comments: Chair Gwyn, Member Nordyke and Alternate Member Matthews

Answers and explanations: Dan Atchison, City Attorney; Josh Eggleston, Chief Financial Officer; David Gerboth, Fire Chief; Kali Leinenbach, Budget Manager; James Wharton-Hess, Senior Fiscal Analyst

7. NEW BUSINESS

8. ADJOURNMENT: 4:30 PM

The next meeting is scheduled for January 20, 2026 at 4:00 PM.

TO: Finance Committee of the Salem City Council and the Urban Renewal Agency of City of Salem

THROUGH: Josh Eggleston, Chief Financial Officer

FROM: Jeremy Morgan, Financial Reporting Manager

SUBJECT:

Fiscal Year (FY) 2025 Financial Audit of the City of Salem, Oregon

ISSUE:

Results of the FY 2025 financial audit of the City of Salem, Oregon

RECOMMENDATION:

Information Only

SUMMARY:

The certified public accounting firm of REDW completed the annual financial audit of the City for the fiscal year ending June 30, 2025. There were no formal findings or recommendations for improvement as a result of the main financial statement audit.

The Single Audit for federal grant compliance resulted in one finding. Reporting of first-tier subawards under the CDBG (Community Development Block Grant) program had not been submitted timely to the FFATA (Federal Funding Accountability and Transparency Act) Subaward Reporting System.

Mr. Ryan Pasquarella, CPA, will present the results of the FY 2024-25 Annual Comprehensive Financial Report (ACFR), the FY 2024-25 Urban Renewal Agency annual financial report, and the FY 2024-25 Federal Grant Compliance Report to the joint meeting of the Salem City Council Finance Committee and the Urban Renewal Agency Finance Committee. As in prior years, the audit report will be provided to City Council as an information item.

FACTS AND FINDINGS:

This was the tenth (and final) consecutive annual audit performed by REDW, pursuant to its current contract with the City and Urban Renewal Agency. Mr. Ryan Pasquarella of REDW, managed the City's audit engagement.

The financial reports can be found on the City's webpage at:

<https://www.cityofsalem.net/government/budget-finance/financial-reports>

BACKGROUND:

Oregon law requires an annual audit of the City's financial statements and for the results to be presented to the governing body. A report for the ACFR will be presented to the full City Council at their regular meeting on February 23, 2026.

Attachments:

1. Independent Auditors Report - FY 2025 City of Salem.



Independent Auditor's Report

Honorable Mayor and Council Members
City of Salem
Salem, Oregon

Report on the Audit of Financial Statements

Opinions

We have audited the financial statements of the governmental activities, the business-type activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the City of Salem, Oregon (the "City"), as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise the City's basic financial statements as listed in the table of contents.

In our opinion, based on our audit and the report of the other auditors, the accompanying financial statements present fairly, in all material respects, the respective financial position of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of the City of Salem, Oregon, as of June 30, 2025, and the respective changes in financial position and, where applicable, cash flows thereof and the respective budgetary comparison for the General fund and major special revenue funds for the year then ended in accordance with accounting principles generally accepted in the United States of America.

We did not audit the financial statements of Salem Housing Authority (SHA), which represent three percent, four percent, and ten percent, respectively, of the assets, net position, and revenues of the government-wide financial statements of the City. Those financial statements were audited by other auditors whose report thereon has been furnished to us, and our opinion, insofar as it relates to the amounts included for SHA, is based solely on the report of the other auditors.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS) and the standards applicable to financial audit contained in *Government Auditing Standards*, issued by the Comptroller general of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the City, and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Financial Statements

The City's management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the City's ability to continue as a going concern for twelve months beyond the financial statement issuance date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the City's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the City's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the management's discussion and analysis (MD&A), and required supplementary information, as listed in the table of contents, be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We and other auditors have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the City's basic financial statements. The supplementary information, as listed in the table of contents, is presented for purposes of additional analysis and is not a required part of the basic financial statements.

The information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the supplementary information is fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Information Included in the Annual Comprehensive Financial Report (ACFR)

Management is responsible for the other information included in the ACFR. The other information comprises the introductory section, other financial schedules, statistical section, and SEC Rule 15c2-12 disclosures but does not include the basic financial statements and our auditor's report thereon. Our opinions on the basic financial statements do not cover the other information, and we do not express an opinion or any form of assurance thereon. In connection with our audit of the basic financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

Other Reporting Required by Legal and Regulatory Requirements

Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated January 22, 2026, on our consideration of the City’s internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the City’s internal control over financial reporting and compliance.

Reporting Required by Oregon Minimum Standards

In accordance with Minimum Standards for Audits of Oregon Municipal Corporations, we have issued our report dated January 22, 2026, on our consideration of the City’s compliance with certain provisions of laws and regulations, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules. The purpose of that report is to describe the scope of our testing of compliance and results of that testing and not to provide an opinion on compliance.



Ryan T. Pasquarella, Principal
For REDW LLC
Salem, Oregon
January 22, 2026

TO: Finance Committee of the Salem City Council and the Urban Renewal Agency of City of Salem

THROUGH: Josh Eggleston, Chief Financial Officer

FROM: Jeremy Morgan, Financial Accounting Manager

SUBJECT:

Fiscal Year (FY) 2025 Urban Renewal Agency (URA) Annual Financial Report

ISSUE:

Receive the FY 2025 URA Annual Financial Report.

RECOMMENDATION:

Information only

SUMMARY:

Under ORS 457.460, each year an Urban Renewal Agency must prepare a report on its finances and file that report with the governing body of the municipality where the agency is located. This report will be forwarded to the full Urban Renewal Agency Board during its regular meeting on February 23, 2026.

FACTS AND FINDINGS:

ORS 457.460 requires an urban renewal agency to report:

1. The tax increment revenue received in FY 2025 and budgeted in FY 2026.
2. The debt service payments made in FY 2025 and budgeted in FY 2026.
3. The amount of debt issued in FY 2025 and budgeted in FY 2026.
4. The amount and purpose of actual expenditures in FY 2025, and budgeted expenditures in FY 2026.
5. An analysis of the impact, if any, of the urban renewal plan on the tax collections for FY 2025 for all taxing districts included under ORS 457.430.
6. The maximum indebtedness for each urban renewal area included in an urban renewal plan of the agency, including the amount of indebtedness incurred through the end of the immediately preceding fiscal year.

The City's Finance Department will ensure that the notice is published as required by ORS 457.460. The statement is on file with the City Recorder, 555 Liberty Street SE, Room 205, Salem, OR 97301, and is available to all interested persons.

Requirements 1-4 are displayed in table 1 below. Expenditures by project can be found on page 71 of the Annual Financial Report of the Urban Renewal Agency located through the link below:

Table 1:

	ORS 457 Requirement	Actual 2024-25	Budget 2025-26
Debt Service Fund			
Beginning balance		\$ 3,437,923	\$ 5,306,810
Tax increment revenue received	1	21,041,042	21,565,950
Debt service expenditures	2	(19,058,078)	(16,771,590)
Other revenue sources		301,823	106,870
Other expenditures		(335,255)	(952,060)
Ending balance		\$ 5,387,455	\$ 9,255,980
Improvements Fund			
Beginning balance		\$ 67,785,388	\$ 69,645,630
Debt issuance proceeds received	3	13,278,400	13,310,000
Improvement expenditures	4	(13,888,325)	(37,457,120)
Other revenue sources		6,407,887	2,094,950
Ending balance		\$ 73,583,350	\$ 47,593,460

Table 2 below meets requirement 5 and shows FY 2025 tax increment revenue that would have gone to the taxing districts if the urban renewal areas had not been in place. An expanded view of the tax increment revenue table below, including the breakout of tax increment revenue by Urban Renewal Plan Area, can be found on page 74 of the Annual Financial Report of the Urban Renewal located through the link above.

Table 2:

Taxing District	
Chemeketa Community College	\$ 829,611
Chemeketa Regional Library	104,185
City of Salem	7,427,362
City of Salem Bonds	164,591
Marion County	3,446,218
Marion 4-H Ext Svc Dist	56,959
Marion Soil & Water	56,959
Polk County	230,728
Polk 4-H/M Garden/Ag/Forest Ext Dist	10,020
Polk Soil/Water Conservation Dist	6,499
Salem Area Mass Transit	969,130
Salem-Keizer SD	5,758,173
Salem-Keizer SD Bonds	363,626
Willamette Regional ESD	377,896
Total	\$19,801,957

Table 3 below meets requirement 6 and shows the maximum indebtedness by area. This information can also be found on page 74 of this same document.

Table 3:

URBAN RENEWAL AGENCY OF THE CITY OF SALEM, OREGON				
Maximum Indebtedness Compliance				
<i>For the fiscal year ended June 30, 2025</i>				
Urban Renewal District	Maximum Indebtedness	Borrowed to Date	Borrowing Capacity Remaining	Outstanding Debt
Riverfront/Downtown	\$ 315,000,000	\$ 155,385,345	\$ 159,614,655	\$ 6,037,000
Fairview	6,286,000	6,281,615	4,385	-
North Gateway	101,466,402	97,266,404	4,199,998	-
West Salem	31,000,000	22,002,425	8,997,575	-
Mill Creek	26,000,000	21,036,299	4,963,701	2,291,834
McGilchrist	11,000,000	11,000,000	-	-
South Waterfront	24,000,000	5,622,000	18,378,000	-
Jory Apartments	20,725,125	1,018,790	19,706,335	-
				<u><u>\$ 8,328,834</u></u>

BACKGROUND:

The City’s independent auditor, REDW, have completed the audit of the Urban Renewal Agency for the year end date of June 30, 2025. Their review resulted with an unmodified opinion and no significant findings.

Attachments:

1. Independent Auditors Report - FY 2025 Salem Urban Renewal Agency.



Independent Auditor's Report

Agency Officials
Urban Renewal Agency of the City of Salem
Salem, Oregon

Report on the Audit of the Financial Statements

Opinions

We have audited the financial statements of the governmental activities, the business-type activities and each major fund of the Urban Renewal Agency of the City of Salem, Oregon (a component unit of the City of Salem, Oregon), as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise the Agency's basic financial statements as listed in the table of contents.

In our opinion, the accompanying financial statements present fairly, in all material respects, the respective financial position of the governmental activities, the business-type activities and each major fund of the Urban Renewal Agency of the City of Salem, Oregon, as of June 30, 2025, and the respective changes in financial position and, where applicable, cash flows thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Agency and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Agency's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Agency's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Agency's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that management's discussion and analysis (MD&A) be presented to supplement the basic financial statements. The information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of

inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the Agency's basic financial statements. The supplementary information as listed in the table of contents is presented for purposes of additional analysis and is not required parts of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the supplementary information is fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Information Included in the Annual Report

Management is responsible for the other information included in the annual report. The other information comprises the agency officials, maps of urban renewal areas, and other information section but does not include the basic financial statements and our auditor's report thereon. Our opinions on the basic financial statements do not cover the other information, and we do not express an opinion or any form of assurance thereon. In connection with our audit of the basic financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

Other Reporting Required by Oregon Minimum Standards

In accordance with Minimum Standards for Audits of Oregon Municipal Corporations, we have issued our report dated December 30, 2025, on our consideration of the Agency's compliance with certain provisions of laws and regulations, including the provisions of Oregon Revised Statutes as specified in Oregon Administrative Rules. The purpose of that report is to describe the scope of our testing of compliance and results of that testing and not to provide an opinion on compliance.



Ryan T. Pasquarella, Principal
For REDW LLC
Salem, Oregon
December 30, 2025



City of Salem: Performance Audit Update

Finance Committee Meeting

February 17, 2026

Baker Tilly Advisory Group, LP and Baker Tilly US, LLP, trading as Baker Tilly, are members of the global network of Baker Tilly International Ltd., the members of which are separate and independent legal entities. Baker Tilly US, LLP is a licensed CPA firm that provides assurance services to its clients. Baker Tilly Advisory Group, LP and its subsidiary entities provide tax and consulting services to their clients and are not licensed CPA firms.

Agenda

- Review progress on prior priorities
- Select final performance audit for 2024–2025 FY
- Discuss priorities for 2025–2026 FY program



Completed Performance Audits

- Enterprise Leadership
- Urban Renewal Area
- Risk Management
- Library



In-Progress Performance Audits

- Parks
- Fire Overtime



City of Salem

Approved Project Criteria

Risk-based approach based on areas that:

- Are primarily funded by the general fund
- Present efficiencies and cost saving opportunities, as indicated by overall program budget and employee count
- Have enterprise impact
- Are aligned with strategic goals and Council priorities
- Disruption or degradation of service would negatively impact other programs and services
- Are mandated by law

Consider organization readiness and capacity as well.

Previously Prioritized Projects Remaining

Function	Primary Funding	FY 2025 Budget	FY 2025 FTE	Notes
IT	General Fund	\$14,194,580	59.75	Propose a citywide system assessment and priority investment roadmap to enhance operational efficiency citywide
Police	General Fund	\$61,837,290 (\$2,865,789 in overtime in FY 2024)	250.4	Propose an overtime study (2021 performance audit and staffing study)
Code Compliance	General Fund	\$1,929,630	12.0	Performance audit to evaluate code compliance activities and priorities
Planning	General Fund	\$3,125,890	17.0	Performance audit could identify opportunities for improvement



Library Performance Audit

Findings and Recommendations



Project Scope



Assess service delivery: Evaluate how well the current allocation of resources supports community access, and how community demand informs these decisions.



Examine community engagement: Review community outreach strategies, input from community members and stakeholders, and how community feedback is used.



Review partnerships and use of volunteers: Analyze the scope and effectiveness of collaborations with local organizations, including use of volunteers.



Evaluate performance measures: Review the relevance, accuracy, and usefulness of performance indicators.



Commendations



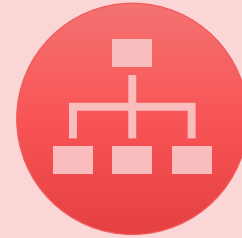
Committed Leadership:

Library leaders are deeply committed to maintaining services and community access despite significant budget and staffing constraints



Proactive Community Engagement and Outreach Efforts:

Staff use creative ways to connect with the community despite limited resources



Effective Collection Management:

The Library's collections are managed strategically, and responsive to community interests



Focus on Continuous Improvement:

Staff are dedicated to process improvement and described a culture of practical innovations to improve operations



Background

	City of Salem	State Average
Total Operating Expenditures per Capita	\$25.08	\$59.54
Budgeted FTE per 1,000 Served	~0.20*	~0.64

*While levy funding restored roughly three FTEs, the Salem Library remains significantly below average staffing levels.



Service Delivery with Limited Resources

Themes	<ul style="list-style-type: none">• Resource allocation is largely guided by staffing and scheduling constraints• Strategies for partnerships and community engagement are in place but could be strengthened• Limited branch locations and open hours restrict community access compared to peer libraries, necessitating alternative strategies to access
Recommendations	<p>Adopt a holistic decision-making framework</p> <ul style="list-style-type: none">• Develop a partnership management plan with clear roles and responsibilities for prioritized partnerships• Develop and implement a formal, consistent, and integrated community engagement plan <p>Prioritize alternative approaches to increasing access</p> <ul style="list-style-type: none">• Mobile and outreach services• Continued collaboration with local organizations



Staff and Volunteer Management

Themes	<ul style="list-style-type: none">• Clarifying staff roles and responsibilities related to service desk coverage and reevaluating supervisory job assignments would support service quality and staff well-being amid current budget and staffing challenges.• Volunteer management could benefit from more centralized coordination to enhance volunteer hours and effectiveness.
Recommendations	<ul style="list-style-type: none">• Staff: The Library should update job descriptions, evaluate supervisory roles and implement scheduling practices that dedicate time for specialized work.• Volunteers: The Library should designate a dedicated a 0.5 FTE volunteer coordinator and consider expanding volunteer roles.



Performance Measures

Finding	Performance metrics provide useful operational data but could be expanded to better capture community impact, equity, and satisfaction.
Recommendation	The Library should expand its performance measurement framework to include: <ul data-bbox="563 554 1337 768" style="list-style-type: none">• Service usage by demographics• Outcome-based impact metrics• Equity-focused indicators• Standardized customer feedback.



Questions?

The information provided here is of a general nature and is not intended to address the specific circumstances of any individual or entity. In specific circumstances, the services of a professional should be sought.

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As of June 3, 2025, Moss Adams LLP has merged with Baker Tilly.

FINAL REPORT

City of Salem
2025 LIBRARY PERFORMANCE AUDIT

February 9, 2026

Baker Tilly Advisory Group, LP
999 Third Avenue, Suite 2800
Seattle, WA 98104

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I. Executive Summary

A. Background, Scope, and Methodology

The City of Salem (the City) engaged Baker Tilly to conduct a performance audit to examine the effectiveness of its Library (the Library), including service delivery, community engagement, partnerships, volunteer use, and performance measurement. This audit evaluates how effectively the Library delivers equitable, impactful, and community-responsive services.



According to Oregon Public Library Statistics¹, the Library’s total operating expenditures per capita (\$25.08) were among the lowest in the state in 2023-2024 (the average is \$59.54). The Library’s staffing levels (0.20 FTE per 1,000 residents) are also well below the average of other libraries in Oregon (0.64 FTE per 1,000 residents). An understanding of the Library’s funding and staffing constraints is essential to interpreting the findings discussed throughout this report.

Baker Tilly performed this engagement between August 2025 and January 2026. To complete the engagement, we conducted interviews, document and data analysis, peer benchmarking, and industry best practice research. Based on the information gained during these activities, we formulated recommendations to help support the Library’s operations within its current financial constraints.

B. Summary of Findings and Recommendations

Our findings and recommendations are summarized below, grouped into three areas: (1) Service Delivery, Community Engagement, and Partnerships; (2) Volunteer Management; and (3) Performance Metrics. Findings and recommendations are detailed in further depth in [Section III](#).

FINDINGS AND RECOMMENDATIONS	
Service Delivery, Community Engagement, and Partnerships	
1. Finding	The Library incorporates staff availability and scheduling constraints into its service delivery decisions and has made efforts to include community input and data in its planning. However, due to limited resources, decisions about service delivery have been primarily driven by operational capacity rather than comprehensive, data-driven, and community-centered decision-making processes that systematically prioritize resources.
Recommendation	Adopt a holistic decision-making framework for strategic resource allocation that strengthens how programs, services, and operational initiatives are prioritized given the Library’s fiscal constraints.

¹ <https://www.oregon.gov/library/libraries/pages/statistics.aspx>

FINDINGS AND RECOMMENDATIONS

2.	Finding	The Library currently maintains a wide array of community partnerships and has established some guidance to support partnership development, but could strengthen its approach to evaluating, managing, and prioritizing partnerships to maximize community impact and resource efficiency.
	Recommendation	To enhance its existing approach to strategically managing partnerships, the Library should apply the Imagine Building Partnerships framework from the American Library Association to evaluate potential and existing partnerships, and then develop a partnership management plan with clear roles and responsibilities for prioritized partnerships.
3.	Finding	The Library's community engagement efforts, while varied and reflective of its commitment to service, lack consistent application, formalization, and systematic integration into decision-making, resulting in gaps in up-to-date community input and underrepresentation of diverse voices.
	Recommendation	The Library should develop and implement a formal, consistent, and integrated community engagement plan that includes conducting regular annual surveys and prioritizing high impact coordinated activities to effectively gather, track, and incorporate community input within existing staff capacity to better align services with evolving community demands.
4.	Finding	Despite recent expansions, the Library's limited branch locations and open hours restrict community access compared to peer libraries, necessitating alternative strategies to meet evolving community needs within existing resource constraints.
	Recommendation	The Library should prioritize alternative approaches—such as continuing to optimize existing hours, enhancing mobile outreach, and strengthening community partnerships—to maximize access and service delivery without expanding physical locations or hours.
5.	Finding	Due to budget pressures and unfilled vacancies, the Library shifted to a model where all staff share service desk coverage, leading to role ambiguity, diverted time from specialized functions, and challenges in supervision and accountability that impact staff morale and service quality.
	Recommendation	The Library should update job descriptions to clearly identify the expected time each role should spend supporting the service desk, implement scheduling practices that protect dedicated time for specialized work, consider leveraging temporary staff and volunteers to support routine work, and evaluate supervisory roles to delegate responsibilities effectively, thereby improving operational efficiency and reducing staff burnout within existing resource constraints.

FINDINGS AND RECOMMENDATIONS

Volunteer Management

6. Finding	The Library's volunteer program uses fewer hours than peers likely due to decentralized management, which impacts effective coordination and volunteer engagement.
Recommendation	The Library should designate a dedicated volunteer coordinator, expand volunteer roles strategically, and implement simple program tracking to improve volunteer management within existing resources.

Performance Metrics

7. Finding	The Library's current performance metrics focus mainly on operational usage data but lack comprehensive measures of community impact, equity, and customer satisfaction, limiting its ability to fully assess service effectiveness and demonstrate levy fund stewardship.
Recommendation	The Library should expand its performance measurement framework to include demographic analysis, outcome-based impact metrics, equity-focused indicators, and standardized customer feedback.

II. Introduction

A. Background

The Library serves approximately 177,700 residents through its two branches: a main downtown location and a West Salem branch. Its collection includes around 398,800 items, with annual circulation of close to 1.15 million items. According to its adopted fiscal year (FY) 2025 budget, the Library operates with 36.62 full-time equivalent (FTE) staff and a budget of \$5.58 million. In May 2025, voters approved Measure 24-514, a five-year local option levy authorizing a property tax of \$0.98 per \$1,000 of assessed value to maintain funding for key community services, including the Library. This levy is projected to raise approximately \$14 million in its first year and a total of \$76 million over five years. Levy funds were projected to support the Library in expanding its operating hours by a total of 20 more hours across the two branches.

Prior to this levy's approval, the City faced a \$13.8 million budget shortfall that was expected to result in significant reductions in Library services. Given the levy approval, City leadership requested this performance audit to evaluate the Library's cost effectiveness in delivering equitable, impactful, and community-responsive services. The audit aims to assess service delivery, community engagement, partnerships and volunteer use, and performance measurement to ensure the Library delivers measurable value to the community and demonstrates accountability with this new funding source.

FUNDING AND STAFFING INSTABILITY

According to Oregon Public Library Statistics², the Library's total operating expenditures per capita (\$25.08) were among the lowest in the state (the average of which is \$59.54) in 2023-2024. Although staff reported the collections budget is relatively stable, operational and staffing budgets remain constrained, limiting the Library's ability to expand hours, outreach, and programming in response to community demand. The City does not have a permanent or diversified funding mechanism to ensure long-term financial stability. While the levy has provided critical maintenance funding following prior budget shortfalls, its temporary nature creates ongoing uncertainty for long-term planning, staffing, and service expansion. The lack of a permanent funding mechanism impacts the Library's ability to maintain adequate staffing and meet evolving community needs.

The Library's staffing levels are also well below the average of other libraries in Oregon, when adjusted for the population served. According to the state statistics referenced above, in 2023-2024 the average ratio of total budgeted FTE staff per 1,000 population served across all 136 public library systems within the state was 0.64, while this ratio for the City of Salem was reported to be 0.20. While levy funding restored roughly three FTEs, the Library remains below average staffing levels.

² <https://www.oregon.gov/library/libraries/pages/statistics.aspx>

The Library’s current resources directly affect its capacity to allocate resources effectively. An understanding of the constraints imposed by funding and staffing instability is essential to interpreting the findings discussed throughout this report.

B. Scope and Methodology

This performance audit evaluated the cost effectiveness of Library services in delivering equitable, impactful, and community-responsive services. Our audit objectives were to:

- **Assess service delivery:** Evaluate how well the current allocation of resources (e.g., staffing assignments, hours of operation, and programming) supports community access, analyze trade-offs in these decisions, and assess how community demand informs these decisions.
- **Examine community engagement:** Review community outreach strategies and methods of gathering input from community members and stakeholders, and how community feedback is used to shape services and priorities.
- **Review partnerships and use of volunteers:** Analyze the scope and effectiveness of collaborations with local organizations, schools, and community groups, including use of volunteers to enhance community involvement.
- **Evaluate performance measures:** Review the relevance, accuracy, and usefulness of performance indicators to demonstrate community impact.

This audit took place between August 2025 and January 2026 and was carried out across the following four phases:

PROJECT PHASES	
Project Phase	Description
1. Startup and Management	<p>Phase 1 consisted of collaborative project planning with City and Library management, including determining who would be interviewed, what documents would be reviewed, what peers would be used in our analysis, when and how results would be shared, and how to report on project status.</p> <p>We conducted a kickoff meeting with the City to confirm expectations and discuss overall project scope, logistics, deliverables, timing, and progress reporting requirements. We clarified the responsibilities of Baker Tilly and City personnel, timing of project activities, communication expectations, peer organizations, and format of deliverables.</p> <p>We conducted project management for the duration of the engagement. This included providing regular status updates to City management and developing draft deliverables for discussion.</p>
2. Fact-Finding	<p>Phase 2 focused on executing planned activities, including document review, City interviews, stakeholder interviews, and peer benchmarking. We obtained the most current information available and insights from City personnel and selected stakeholders.</p> <p>Documentation Review: We gathered relevant documentation for review, including organization charts, job descriptions, financial information, programming information, volunteer data, community outreach plans, and relevant performance measures.</p>

PROJECT PHASES	
	<p>Interviews: We conducted interviews with members of City leadership and staff, including Library staff, City management, and City Council. We also conducted 10 focus groups with community groups, external partners, and other community stakeholders to gather input on their desires for Library operations.</p> <p>Peer Benchmarking: We conducted peer analysis and interviewed library leadership at comparable library systems. We collaborated with City and Library leadership to select comparable peers based on factors such as budget, number of staff, visitors, and circulation size. Peer benchmarking activities included data and document collection, as well as interviews conducted with each peer. Full peer benchmarking results are included in Appendix A: Peer Benchmarking Matrix. The following library systems participated in this analysis:</p> <ul style="list-style-type: none"> • Beaverton • Corvallis-Benton • Deschutes • Eugene • Hillsboro <p>Industry Best Practices: We conducted research into industry best practices for related topics such as public decision-making models, community engagement practices, volunteer management, and performance metrics.</p>
3. Analysis	Based on the information gained during our fact-finding phase, we conducted and consolidated research on relevant industry standards and best practices. Based on this research, we identified potential areas for improvement and developed practical recommendations.
4. Reporting	We communicated the results of our analysis with findings and recommendations presented first in a draft report. The draft report was reviewed with City and Library management to confirm the practicality and relevance of recommendations before finalizing.

C. Statement of Compliance with GAGAS

We conducted this performance audit in accordance with generally accepted government auditing standards (GAGAS). GAGAS requires that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

D. Commendations

We would like to extend our gratitude to City staff for their active engagement and valuable participation during this audit and note the areas of strength and existing good practices that can be leveraged for continued improvement within the Library, including:

- **Committed Leadership:** Staff and stakeholders reported that Library leaders are deeply committed to maintaining services and community access despite significant budget and staffing

constraints. Staff credited management with navigating a history of organizational change while continuing to prioritize public service and staff well-being. Additionally, staff responses to a recent employee engagement survey conducted in early 2025 were largely positive, suggesting a positive workplace culture.

- **Proactive Community Engagement and Outreach Efforts:** Staff regularly seek creative ways to connect with the community despite limited resources; for example, developing virtual library tours for schools, coordinating book delivery across partner sites (e.g., senior living communities and hospital waiting rooms), and expanding Spanish-language outreach. These efforts demonstrate a proactive approach to maintaining visibility and service continuity.
- **Effective Collection Management:** Interview feedback and document review indicate that the Library's collections are managed strategically, with regular assessment of circulation to maintain a diverse and current inventory. Such practices help the Library's collection remain responsive to community interests and usage patterns.
- **Focus on Continuous Improvement:** Staff described a culture of pursuing practical innovations to improve operations. Interviews highlighted staff dedication to process improvement, including developing new onboarding procedures, engaging in committees, and implementing feedback mechanisms to refine staff training.

III. Findings and Recommendations

A. Service Delivery, Community Engagement, and Partnerships

RESOURCE ALLOCATION

1. Finding	The Library incorporates staff availability and scheduling constraints into its service delivery decisions and has made efforts to include community input and data in its planning. However, due to limited resources, decisions about service delivery have been primarily driven by operational capacity rather than comprehensive, data-driven, and community-centered decision-making processes that systematically prioritize resources.
Recommendation	Adopt a holistic decision-making framework for strategic resource allocation that strengthens how programs, services, and operational initiatives are prioritized given the Library's fiscal constraints.

Finding

Resource allocation is a critical aspect of library management, particularly because libraries frequently operate with limited resources while providing a broad spectrum of community services. As such, libraries must prioritize activities in a way that aligns with community needs and the library's overall strategic objectives. To effectively allocate resources, libraries should implement a structured, data-informed, and community-centered decision-making process that aligns resource use with strategic priorities while balancing operational capacity and transparency.

In 2022, the Library established a five-year strategic plan to guide its priorities and focus areas. The strategic plan, which staff reported was developed with community input, includes objectives related to improving community satisfaction, offering a diverse set of services, cultivating impactful community partnerships, increasing accessibility of services, and increasing employee engagement and retention. In alignment with this plan, the Library offers a diverse range of programs and services that reflect its commitment to these objectives and effective community service. Individual divisions, such as Youth Services, also have defined goals and objectives that further illustrate the Library's commitment to community engagement and data-informed planning.

However, while the Library's current resource allocation process includes some data-informed and community input elements, it only partially aligns with best practices. Given challenges with limited staff capacity, decisions about service delivery (e.g., hours, locations, partnerships, and programming) are primarily driven by staff availability and scheduling constraints rather than community input or data-driven prioritization. While some community input is incorporated—primarily through informal methods and as part of the strategic planning process—engagement is not consistently formalized or systematically integrated into ongoing resource allocation decisions.

Notably, the Library established a points-based prioritization tool for determining which programming to offer to the community. Using the tool, staff assign points to various programming options based on

the amount of staff capacity the programming would require. Along with this quantitative scoring system, staff informally consider community input and demand. While staff capacity should be a key consideration in decision-making, relying heavily on it without also considering community feedback and historical usage risks overlooking or unintentionally deprioritizing programs or services that would benefit the community.

Moreover, while the Library has a prioritization tool for programming, it lacks a holistic decision-making model that evaluates trade-offs on how best to allocate limited resources across all options for serving the community beyond just programming, such as adding annexes (locations with book pick-up and drop services throughout the community), adjusting branch hours, or cultivating partnerships. This limitation reduces the Library's ability to strategically target its work to create the greatest community benefit within the current resource-constrained environment, despite the best of staff's intentions.

These challenges largely stem from limited staff capacity, which has necessitated prioritizing operational stability and existing service delivery over more comprehensive, data-driven, and community-informed decision-making processes, which require additional time and resources to operationalize. While this approach is understandable given current constraints, it underscores the need to develop more strategic frameworks that balance capacity limitations with the Library's mission to deliver equitable and impactful services. A more robust decision-making and prioritization framework would help promote programming and resource allocation decisions that are focused on areas where access is most limited.

When compared to peer cities, Salem's approach to prioritization is generally similar. Like Salem, peers often rely on strategic plans, community input, and leadership priorities but typically do not have fully structured frameworks that systematically evaluate trade-offs across all service options. Prioritization in peer cities also tends to be informal or semi-structured, influenced by available resources and operational considerations. However, Salem faces greater resource constraints, particularly in staffing, which further limits its ability to balance operational demands with community-informed and data-driven prioritization.

Recommendation

To align the allocation of its limited resources with community priorities, the Library should develop and implement a resource allocation framework emphasizing core priorities, community engagement, data-driven analysis, strategic alignment, and ongoing monitoring. Such a framework will help promote transparent, equitable, and aligned resource determinations. The following are critical elements of an effective resource allocation framework:

- **Define Core Services and Minimum Service Levels:** The Library should clearly define minimum service levels, focusing on the core services that constitute the essential functions necessary to meet community needs and maintain operational stability. For instance, core services in a library context might include maintaining a baseline number of open hours at each branch, ensuring essential staffing coverage to support safe and effective operations, and offering fundamental program types. These commitments should be documented in operational standards that guide resource allocation decisions. For example, the Library might establish that the downtown branch remains open at least 40 hours per week with a minimum of nine staff members per shift, and that a baseline number of programs be offered monthly. These standards

should be regularly reviewed and adjusted in collaboration with leadership and frontline staff to reflect operational realities and evolving community expectations. Prioritizing these core services ensures operational stability and prevents resource shifts that could undermine essential access. To promote operational stability, the Library should prioritize maintaining these core services before allocating resources to new or expanded programs.

- **Systematic Community Engagement:** Community engagement must be embedded into the resource allocation process to ensure services remain responsive and equitable. The Library should develop a community engagement plan that schedules regular opportunities for input, such as annual surveys, targeted focus groups with underserved populations, quarterly public forums, and ongoing online feedback channels. Employing diverse engagement methods can help capture broad and representative feedback and increase the likelihood that the voices of all community members are heard. Moreover, the Library should establish clear mechanisms to communicate back to the community how their input influences decisions, fostering transparency and trust. Tracking community feedback in a centralized log can help staff monitor key themes, document actions taken, and demonstrate responsiveness.
- **Data-Driven Analysis:** Incorporating data-driven analysis is critical to complement community input and inform prioritization decisions. The Library should implement or enhance systems to routinely aggregate relevant quantitative data, including program attendance, circulation figures, digital resource usage, and branch foot traffic. These data provide a snapshot of current service usage and trends and can help the Library identify areas of high demand, underutilized services, or emerging needs. Reporting should be regularly produced and accessible (e.g., through dashboards or other standard reporting tools) to allow leadership and staff to review these key metrics, identify trends, and highlight underutilized services. Such data reviews typically occur in regular planning or budgeting meetings to ensure resource allocation decisions are grounded in evidence, balancing quantitative insights with qualitative community feedback. This approach reduces the risk of overlooking impactful services simply due to staffing constraints or anecdotal impressions.
- **Alignment with Strategic Goals:** Resource allocation decisions must also be closely aligned with the Library's strategic goals and equity commitments. All programs, services, and resource requests should be explicitly mapped to specific strategic objectives, ensuring that resources advance the Library's mission and priorities. Periodic reviews of the strategic plan should be scheduled to update goals based on emerging community needs, performance data, and organizational capacity. It is also important for Library management to communicate how resource decisions support strategic priorities to reinforce a mission-driven focus among staff and stakeholders and help maintain clarity and cohesion in decision-making.
- **Ongoing Monitoring and Adjustment:** Resource allocation should be treated as a dynamic process requiring ongoing monitoring and adjustment. The Library should define clear outcome-based performance indicators aligned with strategic goals to measure the effectiveness and equity of resource deployment. The Library should also establish a regular review cycle, such as a quarterly or biannual review, to evaluate progress against these indicators and incorporate updated community feedback. When adjustments are necessary, processes should be in place to document proposed changes, justifications, and their impact on core services, ensuring transparency and accountability.

To bring these components together into actionable decisions, the Library should implement a weighted prioritization tool. This tool would evaluate service options across multiple criteria—such as community demand, strategic alignment, staff capacity impact, usage data, partnership or volunteer support, and operational feasibility—assigning scores and weights that reflect their relative

importance. For example, community demand might be weighted most heavily, followed by strategic alignment and staff capacity considerations. Each service or program would be scored on these criteria, and weighted scores calculated to produce a prioritized ranking. This systematic approach ensures that resource allocation decisions are transparent, balanced, and data-informed. Regularly updating the tool with new data and community input, and using it collaboratively with leadership and frontline staff, will help the Library adapt to changing conditions while maintaining focus on core priorities. An example of a weighted resource allocation prioritization tool is included in [Appendix B](#).

Given the Library’s current resource constraints, it is recommended that implementation of this resource allocation framework be phased and scaled appropriately. The Library should focus initially on establishing clear core service priorities and aligning resource decisions with strategic goals, which provide a stable foundation for effective service delivery. Concurrently, the Library can begin modest community engagement and data collection efforts that are feasible within existing capacity. Over time, as resources and staff capacity allow, the Library can expand data-driven analysis, formalize ongoing monitoring, and adopt the weighted prioritization tool to further enhance decision-making. Leveraging partnerships, volunteers, and existing systems can help mitigate capacity challenges, but also requires time and resources to effectively support. This incremental approach balances ambition with practicality, enabling the Library to improve resource allocation in a sustainable and manageable way. Additionally, to support the Library with implementing a resource allocation framework with limited staff capacity, [Appendix B](#) includes tools and templates that can be used for each step described above.

MANAGEMENT RESPONSE	
Management Agreement	Partially agree. A formal framework will improve transparency and consistency but must be scaled to capacity to ensure sustainable doability.
Owner	City Librarian
Target Completion Date	Phase 1 by Fall 2026 and Phase 2 by Spring 2027
Action Plan	<p>Phase 1 will consist of:</p> <ul style="list-style-type: none"> • Documenting our core services and minimum staffing and service levels which reflect the current operational needs in regards to safety, hours, and essential functions. • Creating a decision log as outlined in Appendix B for major service changes. • Standardize quarterly data review of key metrics to present to stakeholders. <p>Phase 2 will consist of:</p> <ul style="list-style-type: none"> • Pilot a weighted prioritization tool for a limited set of decisions, such as for programming and outreach opportunities, and refine based on real outcomes.

PARTNERSHIPS STRATEGY AND USE

2. Finding	The Library currently maintains a wide array of community partnerships and has established some guidance to support partnership development, but could strengthen its approach to evaluating, managing, and prioritizing partnerships to maximize community impact and resource efficiency.
Recommendation	To enhance its existing approach to strategically managing partnerships, the Library should apply the Imagine Building Partnerships framework from the American Library Association to evaluate potential and existing partnerships, and then develop a partnership management plan with clear roles and responsibilities for prioritized partnerships.

Finding

The Library currently maintains a wide array of community partnerships spanning senior living centers, educational organizations, health agencies, and volunteer groups. While these collaborations provide valuable services and outreach, the Library is operating at or near capacity in managing these relationships. As part of its efforts to manage partnerships within existing resource constraints, the Library has articulated a partnership statement to guide its efforts and outline the nature of partnerships the Library pursues. This statement emphasizes collaborations that bring value to the community, align with the Library’s mission, involve library staff coordination and presence, and ensure mutual benefit for all parties. Additionally, the Library maintains a list of feasible partnership and outreach options designed to operate within current staffing and budget constraints. These tools provide practical guidance to help staff identify and pursue partnerships that are manageable and mission-aligned given existing resources.

While this Partnership Statement and list of feasible partnership options guide which types of partnerships the Library should pursue and help ensure capacity-conscious decision-making, the Library’s process for managing partnerships could be strengthened to systematically evaluate and prioritize partnerships based on shared goals, clearly defined roles and responsibilities, mutual resource contributions, and measurable outcomes. Professional guidance, such as the [American Library Association’s Imagine Building Partnerships framework](#) (Imagine framework), offers a valuable tool for libraries to systematically evaluate potential and existing partnerships. The framework considers factors like shared goals, community reach, resource contributions, and capacity to collaborate, and emphasizes the importance of establishing clear communication channels, defining success metrics, and ensuring alignment with the library’s strategic priorities to foster sustainable and impactful collaborations.

Without a more comprehensive framework with clear prioritization criteria for partnerships, the Library risks spreading its limited capacity too thin, potentially missing opportunities to deepen high-impact collaborations or to strategically develop new partnerships that advance equity and access. Adopting a strengthened approach to partnership selection and management would help the Library optimize its partnerships, ensuring they contribute meaningfully to its mission and community goals.

Recommendation

To maximize the impact and sustainability of its community partnerships within existing resource constraints, the Library should continue to enhance its approach to assessing, prioritizing, and managing partnerships. This approach should include the following key actions:

1. **Build Upon Existing Partnership Prioritization Criteria and Guidance:** The Library should review its current partnership statement and list of feasible partnership options to determine whether elements from the Imagine framework could enhance its criteria and guidance for selecting and planning partnerships. For instance, the Imagine Framework includes criteria for whether roles and responsibilities are clearly defined, whether costs are acceptable in relation to the value gained, and whether measurable goals are established.
2. **Apply the Imagine Building Partnerships Framework for Assessment and Management:** The Library should use a practical tool, like the Imagine framework, to systematically assess current and potential partnerships against established criteria. The Imagine framework supports planning, evaluating, and managing partnerships by considering shared goals, community reach, resource contributions, collaboration capacity, and alignment with strategic priorities.
 - a. **Conduct a Comprehensive Partnership Assessment:** The Library should inventory current partnerships and assess each against established criteria, such as the Imagine framework. Through this process, the Library should identify high-impact partnerships that should be strengthened, opportunities for new collaborations that fill service gaps, and partnerships that may no longer align with priorities or capacity.
3. **Implement a Partnership Management Plan:** The Library should develop processes and tools to actively manage partnerships, including regular communication, performance monitoring, and documentation of outcomes. The Library should assign clear roles for partnership coordination to ensure sustainable engagement without overburdening staff.
4. **Leverage Partnerships to Extend Reach and Capacity:** The Library should prioritize collaborations that enable it to deliver services beyond its physical locations, such as partnerships with schools, community centers, transit agencies, and public-private ventures. Through this work, the Library should explore innovative models like shared-use facilities or volunteer-supported programs to amplify impact efficiently.

By adopting this structured, strategic approach, the Library can better focus its limited resources on partnerships that deliver the greatest community benefit, improve operational efficiency, and advance its mission to provide equitable, accessible, and impactful services.

MANAGEMENT RESPONSE	
Management Agreement	Agree. We will strengthen consistency and prioritization, using existing partnership guidance already in place.
Owner	Programming and Outreach Supervisor
Target Completion Date	Fall 2026
Action Plan	<ul style="list-style-type: none"> ● Inventory all active partnerships we currently have, listing the purpose, staff time required, frequency, and value/impact, as well as risks.

MANAGEMENT RESPONSE

- We will apply a scoring rubric aligned to the Imagine Framework and alignment with strategic goals, equity reach, staff time, benefit, and sustainability.
- We will create a partnerships tiers model, similar to our programming points system, that will list the level of strategic impact, operational, and opportunistic opportunities.
- We will develop a partnership management plan which will include roles and responsibilities, partner communication standards, annual review process, and how we pause or stop partnerships when capacity changes.

COMMUNITY ENGAGEMENT

3. Finding

The Library's community engagement efforts, while varied and reflective of its commitment to service, lack consistent application, formalization, and systematic integration into decision-making, resulting in gaps in up-to-date community input and underrepresentation of diverse voices.

Recommendation

The Library should develop and implement a formal, consistent, and integrated community engagement plan that includes conducting regular annual surveys and prioritizing high impact coordinated activities to effectively gather, track, and incorporate community input within existing staff capacity to better align services with evolving community demands.

Finding

The Library seeks community input through methods such as post-event surveys, online feedback forms, and patron-driven collection suggestions. The Library also engages with many community stakeholder groups, including library boards, associations, and foundations; neighborhood associations; school outreach coordinators; and others. While these approaches are commendable and representative of the Library's commitment to responsive community services, these engagement approaches are not consistently applied, formalized, or systematically integrated into decision-making processes.

Additionally, while the Library conducted a community survey in 2025, it had previously not conducted a survey since 2012, creating a gap in community input. Regular community surveys should be a foundational practice to ensure up-to-date, reliable data on community demands and priorities. This aligns with peer practices, as four out of five peer libraries conduct regular surveys, though not all do so annually.

Beyond conducting a regular survey, effective community engagement requires a formalized, consistent, and integrated approach that combines both quantitative methods, like surveys that offer measurable data and trends over time and qualitative methods like focus groups and stakeholder interviews that provide more in-depth insights into community demands and perspectives. In a resource-constrained environment, organizing engagement activities in a planned, coordinated way can be helpful to avoid ad hoc efforts that strain limited staff capacity. Such an approach involves having a clear plan that outlines when and how the Library will gather input (e.g., through regular

focus groups, surveys, board meetings, etc.) and explains how that input will be tracked, reviewed, and used to inform decision-making (like the plan discussed in [Finding 1](#) and [Appendix B](#)). It also includes mechanisms to communicate back to the community about how their feedback has influenced services. A comprehensive community engagement approach captures richer insights, especially from diverse and underserved populations, and helps ensure that community input meaningfully shapes Library decisions.

Without a structured engagement process, community voices risk being underrepresented, making it difficult for the Library to align services and resource allocations with evolving community priorities. Such a gap increases the risk that Library services may not meet residents' expectations or address changing needs.

Recommendation

The Library should develop and implement a formal, consistent, and integrated community engagement plan that builds on its existing efforts and aligns with the resource allocation framework outlined in [Finding 1](#). This plan should:

- Include conducting a regular annual community survey as a minimum foundational practice to gather up-to-date, reliable data on community needs.
- Establish regular, scheduled opportunities to gather community input through a mix of quantitative methods (such as the regular survey) and qualitative methods (such as focus groups, stakeholder interviews, or community forums).
- Define clear processes for tracking, reviewing, and incorporating community feedback into decision-making to ensure input meaningfully informs service planning and resource allocation.
- Include mechanisms to communicate back to the community how their feedback has influenced Library services, fostering transparency and trust.
- Be designed to manage workload effectively within existing staff capacity, prioritizing coordinated and planned engagement activities over ad hoc efforts.
- Emphasize outreach to diverse and underserved populations to capture a broad range of community perspectives.

[Appendix B](#) includes an example Community Engagement Plan Template that can be leveraged to support these efforts. To manage community engagement effectively within current staff capacity, the Library should prioritize engagement activities that offer the greatest value and can be integrated into existing workflows. This might include scheduling community input opportunities to coincide with other planned events, leveraging digital tools for surveys and feedback collection to reduce staff time, and collaborating with partner organizations to extend outreach efforts. Additionally, maintaining a centralized system to track and analyze community input can streamline review and reporting processes.

Given limited resources, the Library may also need to make deliberate choices to focus on a smaller number of high-impact engagement activities rather than attempting to do everything. Prioritizing efforts that reach underserved populations or inform key strategic decisions can help maximize the effectiveness of community engagement while balancing workload demands.

MANAGEMENT RESPONSE	
Management Agreement	Partially agree. We agree that formalization and integration of annual surveys is important and effective to gather community input. However, the results of the surveys must match capacity and ensure we meet the minimum service standards.
Owner	Customer Experience Supervisor
Target Completion Date	Summer 2026 for internal users, Summer 2027 for external users
Action Plan	<p>Develop a community engagement plan that includes target audiences, mode of engagement/surveying, and how input will be used in decision making. With the feedback received, look for themes and actions that can be implemented.</p> <p>We will commit to an annual user survey to capture how our current services are being utilized, find areas for improvement, and see what our community would like to see more of. We will execute the survey by using all existing engagement mechanisms to have a broad reach. We will also make the survey multilingual to capture different audiences.</p> <p>To ensure we capture perspectives from underserved or non-represented community members, including individuals who may not currently use library services, we will incorporate targeted surveys and feedback tools into existing outreach efforts. We will work with community partners and City Boards, such as the Neighborhood Association, to expand our reach.</p> <p>With the feedback received, we will make informed decisions with follow-up to our stakeholders, showing how we implemented feedback.</p>

LIBRARY HOURS

4. Finding	Despite recent expansions, the Library's limited branch locations and open hours restrict community access compared to peer libraries, necessitating alternative strategies to meet evolving community needs within existing resource constraints.
Recommendation	The Library should prioritize alternative approaches—such as continuing to optimize existing hours, enhancing mobile outreach, and strengthening community partnerships—to maximize access and service delivery without expanding physical locations or hours.

Finding

Library hours play a critical role in ensuring community access to services, programs, and resources. Many core Library offerings are only available during open hours, making the number and timing of those hours essential for meeting community needs. Following the passage of the City's 2025 Local Option Levy, which earmarked funds to add at least 20 weekly open hours across the Main and West Salem branches, the Library extended hours beginning November 10, 2025, to improve access and fulfill levy commitments. Open hours at the Main Library increased from 38 to 48 hours per week and

open hours at the West Salem Branch increased from 10 to 21 hours per week (a total of 21 additional weekly hours).

Despite these efforts, the Library’s total open hours remain significantly lower than peer libraries across Oregon. According to Oregon Public Library Statistics³, Salem’s libraries were open approximately 3,198 hours annually, compared to a peer average of 8,665 hours. While Salem’s hours per full-time equivalent staff member are comparable to most peers (with the exception of Deschutes), indicating similar staffing efficiency, the overall limited hours constrain community access.

HOURS FROM STATE LIBRARY STATISTICS						
2023-2024 Oregon State Library Statistics	Salem	Beaverton	Corvallis-Benton	Deschutes	Eugene	Hillsboro
Total Open Hours	3,198	5,250	N/A	15,002	8,094	6,312
Total Number of FTEs	36.62	56.98	46.01	101.60	99.00	75.61
FTE:Total Open Hours	1:87.33	1:92.14	N/A	1:147.66	1:81.76	1:83.48

With the additional 21 hours per week that recently went into effect, Salem’s total open hours increased to approximately 4,290 hours per year, which still falls below all peers considered in this analysis.

In response to the City’s 2025 Community Satisfaction Survey results, which showed strong demand for expanded Sunday and evening hours as well as earlier weekday openings to accommodate diverse schedules, the Library increased Sunday and evening hours at the Main Branch and also extended evening hours one day per week at the West Salem branch. However, the Main Branch is closed on Mondays and closes earlier on Fridays and Saturdays than most peers, due to the Library’s staffing constraints.

COMPARISON OF OPEN HOURS ACROSS MAIN/DOWNTOWN BRANCHES						
Day	Salem	Beaverton	Corvallis-Benton	Deschutes	Eugene	Hillsboro
	Main Branch	Main Branch	Corvallis Branch	Downtown Bend Branch	Downtown Branch	Main Branches
Total Number of FTEs (across all branches)	36.62	56.98	46.01	101.60	99.00	75.61
Monday	Closed	10:00 AM-7:00 PM	9:00 AM-7:00 PM	9:00 AM-8:00 PM	9:30 AM-6:00 PM	10:00 AM-8:00 PM

³ <https://www.oregon.gov/library/libraries/pages/statistics.aspx>

COMPARISON OF OPEN HOURS ACROSS MAIN/DOWNTOWN BRANCHES						
Day	Salem	Beaverton	Corvallis-Benton	Deschutes	Eugene	Hillsboro
	Main Branch	Main Branch	Corvallis Branch	Downtown Bend Branch	Downtown Branch	Main Branches
Tuesday	10:00 AM-7:00 PM	10:00 AM-7:00 PM	9:00 AM-7:00 PM	9:00 AM-8:00 PM	9:30 AM-8:00 PM	10:00 AM-8:00 PM
Wednesday	10:00 AM-7:00 PM	10:00 AM-7:00 PM	9:00 AM-7:00 PM	9:00 AM-8:00 PM	9:30 AM-8:00 PM	10:00 AM-8:00 PM
Thursday	10:00 AM-7:00 PM	10:00 AM-6:00 PM	9:00 AM-7:00 PM	9:00 AM-8:00 PM	9:30 AM-8:00 PM	10:00 AM-8:00 PM
Friday	10:00 AM-5:00 PM	10:00 AM-6:00 PM	9:00 AM-6:00 PM	9:00 AM-6:00 PM	9:30 AM-6:00 PM	10:00 AM-6:00 PM
Saturday	10:00 AM-5:00 PM	10:00 AM-6:00 PM	9:00 AM-6:00 PM	9:00 AM-4:30 PM	9:30 AM-6:00 PM	10:00 AM-6:00 PM
Sunday	10:00 AM-5:00 PM	1:00 PM-6:00 PM	1:00 PM-5:00 PM	9:00 AM-6:00 PM	1:00 PM-5:00 PM	10:00 AM-6:00 PM

While increasing branch hours is important, it may not fully address access challenges in underserved areas, especially given that the Library operates only two physical locations: the Main Branch and the West Salem Branch. This limited geographic availability, combined with constrained hours, restricts equitable access and may disproportionately affect residents who face access barriers such as transportation. Stakeholder interviews reinforced these concerns, with limited hours cited as a primary barrier to participation, particularly for youth and working families. Although stakeholders praised the Library’s efforts, they also emphasized the need for mobile outreach options, such as bookmobiles and book nooks, to help bridge gaps in accessibility given current staffing constraints. Overall, the combination of limited hours and branch locations poses a significant challenge to the Library’s ability to meet the evolving needs of its diverse community.

Recommendation

Ideally, the Library would expand both its physical access points and open hours to better meet community needs and improve access. However, given current resource limitations, adding new sites or significantly increasing hours is not feasible. Therefore, the Library should focus on alternative strategies that maximize community access and service delivery within existing constraints. Such strategies should include:

- **Continuing to Optimize Existing Hours Based on Community Needs:** Building on recent efforts to extend Sunday and evening hours in response to community feedback and the Local Option Levy commitments, the Library should continue to regularly monitor usage data and community input to assess how well current hours meet community needs on a regular basis and identify when adjustments may be necessary.

- **Enhancing Mobile and Outreach Services:** The Library should consider expanding mobile options such as bookmobiles, book nooks, and pop-up library services to bring resources directly to underserved neighborhoods and populations that face transportation or other barriers. These outreach efforts help bridge gaps in access and provide flexible service points that complement physical branches. It is important to note that expanding these services would require additional staffing, funding, and logistical support to be sustainable and effective.
- **Strengthening Partnerships:** The Library should prioritize continued collaboration with schools, community centers, transit agencies, and local organizations to offer services and programming in alternative community locations. These partnerships would extend the Library’s presence and impact without the costs and constraints of additional physical branches.

These strategies offer practical ways for the Library to enhance equitable access and better respond to community needs within current resource limitations, while still honoring commitments tied to the Local Option Levy.

MANAGEMENT RESPONSE	
Management Agreement	Agree. We will continue to optimize within staffing and budget while recognizing levy-driven commitments and safety and service minimums.
Owner	City Librarian, Youth and Adult Services Supervisors
Target Completion Date	Ongoing
Action Plan	<p>Our Levy commitments state that we have restored hours at both Main and West Salem Libraries that equaled to a minimum of 20 hours. The hours that we currently have at both libraries are a reflection of a community survey done in October 2025. We will continue to review door counts, reference transactions by hour and day to determine whether the hours continue to align with demand.</p> <p>We will evaluate mobile outreach options that are scalable models that include additional pop-up library sites, book nooks/deposit collections, and targeted outreach events.</p> <p>We will continue to access partnerships to ensure that we have high impact access partners for consistent service points or programs.</p>

ROLES AND RESPONSIBILITIES

5. Finding	Due to budget pressures and unfilled vacancies, the Library shifted to a model where all staff share service desk coverage, leading to role ambiguity, diverted time from specialized functions, and challenges in supervision and accountability that impact staff morale and service quality.
Recommendation	The Library should update job descriptions to clearly identify the expected time each role should spend supporting the service desk, implement scheduling practices that protect dedicated time for specialized work, consider leveraging temporary staff and volunteers to support routine work, and evaluate supervisory roles to delegate responsibilities effectively, thereby improving operational efficiency and reducing staff burnout within existing resource constraints.

Finding

Historically, the Library had a traditional approach to assigning staff roles and responsibilities, with clear distinctions between public-facing and operational support roles. However, due to budget pressures and unfilled vacancies, the Library shifted toward a model where all staff, regardless of their primary role, share responsibility for service desk coverage. This collectivist approach has become the norm, and staff from technical services, programming, and management regularly attend desk shifts to ensure minimum coverage during operating hours. While this approach allows the Library to keep its doors open and maintain a baseline level of service, it has also diverted staff time away from specialized activities such as collection development, outreach, programming, and technical processing.

Supervisors and managers often juggle multiple roles, such as overseeing both programming and collection management and managing youth services and outreach. Technical services staff who previously focused exclusively on acquisitions and cataloging are now routinely scheduled for public service desk shifts, sometimes at the expense of important essential technical functions such as processing new materials, maintaining the catalog, and managing collection metadata. This intertwining of functions has resulted in unclear reporting lines, and staff reported it creates some uncertainty about who to approach for guidance or performance feedback.

The Library has also not regularly reviewed and updated job descriptions and reporting structures to align them with current operating realities, which contributes to ongoing role ambiguity. Staff often revert to historical practices to support each other, rather than following defined roles and responsibilities.

This flexible but ad hoc approach has several consequences, including impacts on staff morale and retention, since employees can experience stress and burnout from frequent task-switching and unclear expectations. The lack of clarity in roles and responsibilities also makes it difficult to hold staff accountable for outcomes, and for staff to develop a sense of ownership in their contribution to the Library. These factors reduce the Library's capacity to deliver consistent, high-quality services across all community segments, and hinder efforts to provide equitable access and outreach.

Recommendation

Recognizing that limited staffing may require continuing the current approach where staff from various areas support service desk coverage, the Library should implement strategies to operate this model more effectively while minimizing its impact on specialized functions.

First, the Library should work with the City's Human Resources Department to update its job descriptions. Often, job descriptions include a percentage of time that each role can expect to be on desk shifts to provide patron service. This can help confirm expectations for each role based on how they should generally be spending their time and can assist in scheduling for the appropriate distribution of hours. As the Library reevaluates its job descriptions, it should consider whether supervisory duties should be incorporated into the Senior Librarian role. Often, Senior Librarian positions have responsibilities to supervise staff and volunteers, serving as a liaison between their managers and front-line staff. This would not only benefit existing supervisors at the Library but also provide leadership experience and develop a management pipeline for high-potential employees. Changes to job descriptions, especially those involving the addition of supervisory duties to the

Senior Librarian role, may require discussions with union representatives to ensure alignment with collective bargaining agreements and staff expectations.

Additionally, the Library should establish scheduling practices that align with job description expectations and dedicate blocks of time for specialized work such as collection development, outreach, programming, and technical processing based on role. This means creating schedules that clearly designate periods when staff are free from desk duties to focus on their core responsibilities, reducing task-switching and allowing for deeper concentration and productivity. Scheduling should be informed by data on peak service hours and staff availability to optimize coverage while preserving essential work time. Additionally, supervisors can coordinate with staff to identify critical projects or deadlines that require uninterrupted focus, adjusting desk assignments accordingly.

Where possible, leveraging temporary staff to assist with routine tasks such as shelving and shelf reading may also alleviate pressure on professional staff and supervisors, freeing them to focus on leadership, patron service, and specialized tasks. If temporary staff is used, the Library should develop clear training materials and protocols to onboard temporary or part-time staff efficiently, ensuring they can provide quality service with minimal supervision. This approach can help maintain consistent service levels while protecting the core work of permanent staff. Additionally, continuing to explore partnerships with community volunteers for certain routine off-desk tasks may offer further relief, provided adequate training and oversight are in place (see also [Volunteer Management](#)).

MANAGEMENT RESPONSE	
Management Agreement	Partially agree. We support role clarity and protected time. We cannot assign volunteers to union-represented work under our current AFSCME agreements. Any changes need to be done in collaboration with our Human Resources and Union partners.
Owner	City Librarian, Human Resource Business Partner, Library Supervisors
Target Completion Date	December 2026 for job description review
Action Plan	<p>The library already has in place desk coverage expectations by classification and role. We have a desk coverage standard that is tied to operational needs. These desk coverage standards sometimes must adapt/change due to vacation or sick leave, which result in more desk time across the organization.</p> <p>We currently have implemented specialized time blocks where each staff member has time to do off-service desk work. We utilize peak-demand data to inform when desk coverage is needed the most (door count and reference transactions).</p> <p>We use volunteers to fill gaps in services where needed and applicable to assist with some of the off-service desk tasks that help in all departments. We also will utilize seasonal and on-call staff to help during peak seasons in the library such as during Spring and Summer Break.</p>

B. Volunteer Management

6. Finding	The Library’s volunteer program uses fewer hours than peers, likely due to decentralized management, which impacts effective coordination and volunteer engagement.
Recommendation	The Library should designate a dedicated volunteer coordinator, expand volunteer roles strategically, and implement simple program tracking to improve volunteer management within existing resources.

Finding

The Library’s volunteer program uses fewer volunteer hours compared to other similarly sized Oregon public library systems. Based on the most recent Oregon Public Library Statistics (2023-2024)⁴, the average volunteer hours for peers reviewed in this audit was 9,649 hours. This figure is skewed by Hillsboro, which is significantly higher than the others with over 19,000 annual volunteer hours. Omitting Hillsboro, the average is 7,206 hours, still over 1,500 hours more than Salem’s reported 5,666 hours (equivalent to 2.83 FTE).

LIBRARY SYSTEM	ANNUAL VOLUNTEER HOURS	VOLUNTEER HOURS (FTE EQUIVALENT)	VOLUNTEER HOURS PER 1,000 POPULATION
Salem	5,666	2.7	31.0
Beaverton	4,979	2.4	33.6
Corvallis-Benton	4,886	2.3	54.6
Deschutes	9,034	4.3	42.6
Eugene	9,925	4.8	56.0
Hillsboro	19,423	9.3	123.5

Several factors contribute to limited volunteer usage compared to peers. One limitation commonly recognized by interviewees was the absence of a dedicated volunteer coordinator. Volunteer management responsibilities are currently decentralized and distributed across multiple staff members who also have other primary duties, limiting the time and resources available for effective volunteer program management. This fragmented coordination leads to challenges in volunteer training, scheduling, and retention, contributing to inconsistent volunteer engagement and frequent shift cancellations that require staff to fill gaps, further straining limited staffing resources.

Four out of five peers (Corvallis, Deschutes, Eugene, and Hillsboro) have dedicated staff managing volunteer programs. They also have higher staffing levels, which may influence how well they are

⁴ [State Library of Oregon: Public Library Statistics: Oregon Libraries: State of Oregon](#)

able to manage and deploy volunteer resources. Peer libraries with dedicated volunteer coordinators typically have expanded volunteer roles that include program support, outreach assistance, and supervised patron services. They also tend to use more formal volunteer recruitment, training, and retention strategies supported by volunteer management software and intentional volunteer engagement and appreciation events. While the City of Beaverton does not have a dedicated volunteer coordinator, they manage volunteer programs through a distributed model with volunteer liaisons using centralized software and strong volunteer engagement practices.

LIBRARY SYSTEM	ANNUAL VOLUNTEER HOURS	DEDICATED VOLUNTEER COORDINATOR	FTE STAFF
Salem	5,666	No	36.62
Beaverton	4,979	No	56.98
Corvallis-Benton	4,886	Yes	46.01
Deschutes	9,034	Yes	101.60
Eugene	9,925	Yes	99.00
Hillsboro	19,423	Yes	75.61

Interviewees also expressed concern that the Library’s strict privacy policies, which restrict volunteers from accessing confidential patron information and computer systems, limit how volunteers can be used. These restrictions, however, are consistent with standard practices across peer libraries and are necessary to protect patron privacy and comply with legal and ethical standards, including the American Library Association’s Code of Ethics. Consequently, Salem’s volunteers primarily support non-confidential operational tasks such as shelving, shelf reading, material preparation, and limited program support, which is similar to the roles volunteers perform in peer libraries.

While Salem’s volunteer program aligns with peers in focusing on essential behind-the-scenes tasks, many peer libraries engage volunteers in a broader range of community-facing and programmatic activities, such as staffing welcome stations, leading story time programs, and independently conducting outreach events. This comparison highlights potential opportunities for the Library to expand volunteer roles, particularly in outreach and program support, without compromising privacy protections. Expanding volunteer roles to include outreach support could involve training volunteers to represent the Library at community fairs, neighborhood events, and local schools, helping to raise awareness of Library services and programs. Volunteers could also assist with organizing and facilitating outreach activities or informational sessions at community centers and partner organizations. Additionally, volunteers might serve as ambassadors who connect with underserved populations, gather community feedback, and help bridge gaps between the Library and diverse community groups.

Lastly, while the Library uses software called Volgistics to track volunteer activities, it currently lacks a systematic method to measure and evaluate its volunteer program’s effectiveness and impact. Key metrics such as volunteer retention rates, frequency and types of volunteer activities, and volunteer satisfaction are not consistently tracked or analyzed. Without this data, the Library has limited insight

into volunteer engagement patterns, program strengths, and areas needing improvement. This lack of measurement hinders the Library's ability to identify barriers to volunteer recruitment and retention, allocate resources effectively, and develop targeted strategies to expand volunteer hours and roles.

Recommendation

The Library should consider designating at least 50% of a full-time staff position to serve in a dedicated volunteer coordinator role. This is intended to provide focused leadership and accountability for volunteer recruitment, training, scheduling, retention, and program development. Given the Library's limited staffing resources, having a dedicated volunteer coordinator is especially important for using volunteers more strategically and effectively. A focused role can help reduce common challenges such as high volunteer turnover, inconsistent engagement, and scheduling conflicts by ensuring volunteers are well-supported and integrated into Library operations. To implement this within existing resource constraints, the Library should evaluate current staff roles and responsibilities to identify opportunities for reallocation or consolidation. This may involve redistributing duties, streamlining workflows, or leveraging temporary or part-time assistance to ensure the volunteer coordination role is assigned to someone with adequate capacity and support—without compromising other essential services.

In addition to establishing a centralized volunteer coordinator, the Library should consider strategically expanding volunteer roles to include more community-facing and outreach activities. In a resource-scarce environment, empowering volunteers to represent the Library at local events, assist with program facilitation, and engage underserved populations offers a cost-effective way to extend the Library's reach and deepen community connections. For instance, volunteers may be able to distribute flyers, promote services, and share their personal experiences about the Library's value. Equipping volunteers with non-confidential engagement tools like business cards, key staff contact information, and QR codes linking to the Library's website can enable them to respond to basic inquiries and direct prospective patrons to staff for more specific assistance as needed. With proper training and clear guidelines, volunteers can take on meaningful responsibilities that alleviate staff workload, enhance service delivery, and foster stronger relationships with diverse community groups, helping the Library achieve greater impact without requiring significant additional staffing resources. Given union agreements and work protections, the Library may need to coordinate with union representatives when expanding volunteer activities to ensure compliance with collective bargaining agreements.

The Library should also implement a structured system to measure and evaluate its volunteer program. Given the Library's limited staffing and resources, it should implement a streamlined, manageable system. This could include adopting simple tracking tools, such as spreadsheets, to record key metrics like volunteer hours, retention, activity types, and satisfaction. Regular reviews of this data can help identify trends and inform targeted improvements without overburdening staff. Coupling this data-driven approach with the designation of a dedicated volunteer coordinator will enhance the Library's ability to support volunteers effectively, address challenges like turnover, and strategically expand volunteer roles within existing capacity constraints.

MANAGEMENT RESPONSE	
Management Agreement	Partially agree. The implementation of having volunteers be more active in certain activities need to be evaluated and agreed upon by our labor union. We support improved coordination and tracking. Assigning a staff member to this role will require reevaluation of services and duties to ensure we have capacity for this person to fulfill this role as it takes a lot of time, focus, and energy to recruit, train, and retain volunteers.
Owner	Library Management Team
Target Completion Date	Winter 2026
Action Plan	<ul style="list-style-type: none"> • Evaluate current staff roles and assignments to see which one would fit best with taking on the volunteer coordination. • Define what tasks, duties, and responsibilities volunteers can do that is compliant with privacy rules and labor agreements. • Report our tracking on retention, hours by role, and training completion using Volgistics.

C. Performance Metrics

7. Finding	The Library's current performance metrics focus mainly on operational usage data but lack comprehensive measures of community impact, equity, and customer satisfaction, limiting its ability to fully assess service effectiveness and demonstrate levy fund stewardship.
Recommendation	The Library should expand its performance measurement framework to include demographic analysis, outcome-based impact metrics, equity-focused indicators, and standardized customer feedback.

Finding

Public libraries should employ a balanced set of performance indicators that include quantitative and qualitative measures across multiple dimensions. Best practices highlight the importance of comprehensive performance measurement frameworks that include service usage, community impact, equity, and customer satisfaction metrics. They also emphasize the importance of combining quantitative data, such as program attendance and resource access, with qualitative assessments to evaluate library effectiveness and community engagement, particularly among underserved populations.

Like many other libraries nationwide, the Library's current performance measures are primarily focused on operational metrics including the number of monthly visitors, cardholders, programs, meeting/study room reservations, reference/directional assistance interactions, physical item checkouts, and digital item checkouts. These measures are reported in the City Librarian's report, which is shared with the Library's advisory boards and City leadership monthly. The Library also tracks additional usage statistics included in its internal reports, such as program attendance by age group and circulation by location. However, staffing and resource limitations have prevented the

Library's ability to expand performance measurement and community feedback efforts to assess its performance and service delivery more comprehensively. Additional performance measures to enhance the Library's understanding of its effectiveness and better align services with community needs could include:

- **Service Usage by Demographics:** Tracking metrics like circulation, program attendance, library visits, and physical and digital resource access by patron demographics such as zip code.
- **Community Impact:** Measuring outreach participation, engagement with underserved populations, literacy and educational outcomes linked to library programs, and partnerships.
- **Equity:** Monitoring service access and satisfaction across diverse demographic groups, languages, socioeconomic status, and geographic locations.
- **Customer Satisfaction:** Conducting regular community surveys, collecting feedback, and analyzing qualitative trends in patron experience.

Because of these limitations with its performance measurement approach, the Library cannot fully assess the effectiveness of its services or demonstrate its value to stakeholders. Without impact and equity-focused performance measures, the Library is limited in its assessment of how well it serves all community segments, particularly those facing greater barriers. Furthermore, effective performance measurement and reporting can help build community trust, which is pivotal for building confidence among community members and stakeholders that the Library is responsibly and effectively stewarding public funds. When the public trusts that tax dollars are managed transparently and clearly lead to meaningful community benefits, they may be more likely to support current and future funding initiatives. Trust also fosters stronger community engagement, encourages volunteerism and donations, and helps the Library maintain its reputation as a valuable, accountable, and worthwhile public institution. Without trust, skepticism can grow, making it harder to secure necessary resources and sustain services that meet community needs.

Like the Library, many peer libraries primarily track operational metrics such as circulation numbers, program attendance, library visits, and resource checkouts. While some peers like Eugene and Deschutes have started tracking outreach and engagement with underserved populations, comprehensive equity and community impact measures remain uncommon. However, best practices emphasize that adopting a broader performance measurement framework, including demographic, equity, and impact metrics, is essential. Such metrics enable a clearer understanding of how well the Library meets the needs of all community segments, especially underserved populations. Additionally, they support data-driven decision-making that aligns resources with community priorities and helps identify gaps in service delivery. Given the Library's funding challenges, diverse community needs, and recent levy approval, expanding these metrics will help the Library steward its limited resources to best serve the broadest range of residents, demonstrate accountability for public funds, and build stronger community trust and support.

Recommendation

Building on its existing operational metrics, the Library should develop and implement a more comprehensive performance measurement framework that integrates quantitative and qualitative indicators aligned with its strategic goals and community priorities. This expanded metric monitoring and reporting framework should leverage technology solutions to streamline data collection and

reporting, enabling timely and transparent communication with stakeholders. Potential metrics include:

- **Service Usage by Demographics:** Circulation by zip code, program attendance by age group, and digital resource access by language preference.
- **Community Impact:** Number of outreach events by area, participation rates among underserved groups, and literacy improvement measures linked to programs.
- **Equity Metrics:** Percentage of multilingual staff, languages available in communications and resources, and satisfaction scores disaggregated by demographic groups.
- **Customer Satisfaction:** Broad use of standardized post-event surveys and online feedback response rates for trend analysis of patron feedback, disaggregated by age and residence.

The Library should incorporate these metrics into their performance tracking to enable more transparent demonstration of levy fund stewardship, continuous improvement and support decision-making. As it does, it will be important for the Library to ensure the data is collected consistently and accurately, to allow leadership to turn data into simple charts and reports that are easy to understand and shed light on areas that are working well and those that may need intervention. A systematic approach to collecting, understanding, and sharing these metrics help the community and city leaders understand the health of the Library and where their continued support is making an impact for Library operations, and ultimately, the community. The following are key elements that support proper implementation:

- **Leveraging Familiar Systems:** Use available software or spreadsheets and add items for tracking, like program attendance by age or zip code.
- **Training Staff:** Ensure everyone understands how to collect data properly and why it matters.
- **Creating a Schedule:** Set a regular interval for how often data should be collected, reviewed, and reported (e.g., monthly or quarterly).
- **Assigning Responsibility:** Have someone take ownership of making sure data is collected, analyzed, and shared appropriately and in alignment with policies and goals. This can support long-term consistency and accuracy.

By enhancing the measuring of demographic and outcome data, the Library can introduce stronger performance reporting through standardized satisfaction measures and improved transparency and justify continued public trust, support, and investment.

MANAGEMENT RESPONSE	
Management Agreement	Agree. We will expand measurements in a way that is sustainable, accurate, and mindful of system limitations and taking into consideration privacy standards and staff time.
Owner	Library Management Team
Target Completion Date	Winter 2026
Action Plan	<ul style="list-style-type: none"> • Create a performance measurement framework that is aligned to report out strategic plan goals, levy stewardship and equity/access priorities.

MANAGEMENT RESPONSE

- Add a set of new metrics that will measure customer satisfaction using post program surveys and annual engagement surveys.
- Add reporting metrics on how many outreach events we attended, how many were in attendance, and which sites/areas were served.
- Add reporting metrics that will measure equity/access by counting the number of program attendance by age group, language access offerings, and geographic location when feasible.
- Develop a simple reporting dashboard that we can report to our stakeholders on a monthly basis.

Appendix A: Peer Benchmarking Matrix

As part of this performance audit, Baker Tilly conducted peer analysis and interviewed library leadership at the library systems of Beaverton, Corvallis-Benton, Deschutes, Eugene, and Hillsboro. Peer benchmarking activities included data and document collection, as well as interviews conducted with each peer. The following table provides an overview of key characteristics of each peer, and we included a summary of lessons learned and best practices drawn from our discussions, research, and benchmarking. Data is pulled from the 2023-2024 Oregon State Library Statistics unless otherwise noted.

TOPIC	SALEM	BEAVERTON	CORVALLIS-BENTON	DESCHUTES	EUGENE	HILLSBORO
General Information						
Total Budget for Expenditures for FY24-25 *data pulled from city budget books	\$5.58 million	\$8.96 million	2023-2025 Biennium: \$7.22 million	\$20.89 million	2023-2025 Biennium: \$32.57 million	\$15.69 million
Use of a Special Funding District or Cooperative *data pulled from city budget books	No	Yes, part of a county cooperative	Yes, part of a County Service District	Yes, operates as a Special District	No	Yes, part of a county cooperative
What is the total number of FTE?	36.62	56.98	46.01	101.60	99.00	75.61
What is the total population served?	182,726	148,075	89,514	212,141	177,339	157,379
Ratio Population Served Per FTE	1:4,990	1:2,599	1:1,946	1:2,088	1:1,791	1:2,081
Total Open Hours	3,198	5,250	N/A	15,002	8,094	6,312
Ratio Open Hours Per FTE	1:87	1:92	N/A	1:148	1:82	1:83
Library Branches in Operation	2	2	4 + Bookmobile	6	3	2
Hours of operation (Main Branch) *peer data pulled from public websites	Main Branch: Monday: Closed Tuesday 10:00 AM-7:00 PM Wednesday 10:00 AM-7:00 PM Thursday 10:00 AM-7:00 PM Friday 10:00 AM-5:00 PM Saturday 10:00 AM-5:00 PM Sunday 10:00 AM-5:00 PM	Main Branch: Monday 10:00 AM-7:00 PM Tuesday 10:00 AM-7:00 PM Wednesday 10:00 AM-7:00 PM Thursday 10:00 AM-6:00 PM Friday 10:00 AM-6:00 PM Saturday 10:00 AM-6:00 PM Sunday 1:00 PM-6:00 PM	Corvallis Branch: Monday 9:00 AM-7:00 PM Tuesday 9:00 AM-7:00 PM Wednesday 9:00 AM-7:00 PM Thursday 9:00 AM-7:00 PM Friday 9:00 AM-6:00 PM Saturday 9:00 AM-6:00 PM Sunday 1:00 PM-5:00 PM	Downtown Bend Branch: Monday 9:00 AM-8:00 PM Tuesday 9:00 AM-8:00 PM Wednesday 9:00 AM-8:00 PM Thursday 9:00 AM-8:00 PM Friday 9:00 AM-6:00 PM Saturday 9:00 AM-4:30 PM Sunday 9:00 AM-6:00 PM	Downtown Branch: Monday 9:30 AM-6:00 PM Tuesday 9:30 AM-8:00 PM Wednesday 9:30 AM-8:00 PM Thursday 9:30 AM-8:00 PM Friday 9:30 AM-6:00 PM Saturday 9:30 AM-6:00 PM Sunday 1:00 PM-5:00 PM	Main Branches: Monday 10:00 AM-8:00 PM Tuesday 10:00 AM-8:00 PM Wednesday 10:00 AM-8:00 PM Thursday 10:00 AM-8:00 PM Friday 10:00 AM-6:00 PM Saturday 10:00 AM-6:00 PM Sunday 10:00 AM-6:00 PM
Volunteer Management						
Total Volunteer Hours	5,666	4,979	4,886	9,034	9,925	19,423
Have a volunteer coordinator position? *peer data based on interviews	No	No	Yes	Yes	Yes	Yes
Measures of Volunteer Contributions *peer data based on interviews	Volunteer hours	Volunteer hours, volunteer surveys	Not specified	Annual report tracking volunteer impact (includes number of volunteers, volunteer hours, taxpayer money saved, volunteer demographics, and qualitative impact information)	Volunteer hours	Volunteer hours

TOPIC	SALEM	BEAVERTON	CORVALLIS-BENTON	DESCHUTES	EUGENE	HILLSBORO
Community Input						
Recent or Annual Community Survey *peer data based on interviews	Yes, in 2025	Yes	No	Yes	Yes	Yes
Additional Community Input Methods	Surveys (in-person, online, and paper), physical and digital feedback forms, and staff observations	Focus groups (in-person and hybrid), 1:1 interviews with key personnel and community members; outreach through city channel and partners	Community conversations and outreach; partnerships with police and social service agencies; annual Care Event; ongoing relationship building	Open houses; fairs; tabling; focus groups; poster sessions	Small meetings and social media engagement; ongoing outreach to new communities including Spanish speakers	1:1 interviews; focus groups with users and non-users including Spanish speakers and unhoused community; stipend policy for community members providing feedback; use of "Engage Hillsboro" platform and city communication channels

LESSONS LEARNED

Decision-Making

- Salem's Library has a five-year strategic plan that runs through 2027, providing a clear multi-year framework for guiding library priorities. In comparison, peer libraries show a range of strategic planning approaches: some have experienced inconsistent updates due to organizational changes, while others integrate community input and align plans with city council initiatives or board goals. Several peers are in the process of developing or updating strategic plans, often with board and/or consultant support alongside annual or biennial goal-setting cycles. A key lesson for Salem is to consider incorporating more frequent progress reporting and stronger alignment with broader City priorities and community feedback.
- Salem's strategic plan development is primarily led by staff committees, with some management input and stakeholder involvement. In comparison, peer libraries engage a broad range of participants, including extensive community input gathered through surveys, focus groups, and interviews, as well as involvement from library boards, senior leadership teams, advisory boards, and consultants. This highlights an opportunity for Salem to expand stakeholder engagement and incorporate additional structured community feedback mechanisms to ensure the strategic plan reflects diverse perspectives and strengthens community alignment.
- Salem's strategic plan is intended to guide departmental goals and programming; however, its practical use is often limited by staffing constraints and the need to address urgent operational issues. In contrast, peer libraries more consistently integrate their strategic plans into budgeting and service decisions, aligning priorities with city council initiatives, community needs, and equity frameworks. They use the plan to inform multi-year budget planning, annual work plans, and programming decisions, often involving tiered decision-making processes and incorporating community and staff input. Salem could benefit from strengthening the connection between its strategic plan and resource allocation by embedding the plan more intentionally into budgeting and programming processes.
- Salem communicates strategic decisions primarily through internal staff meetings, Teams channels, and monthly reports from the City Librarian, with limited outreach to external stakeholders. Peer libraries employ more diverse and proactive communication strategies, including sharing frameworks and survey results via city channels and community partners, utilizing social media, distributing flyers, attending community events, and engaging through advisory boards and public feedback processes. This suggests an opportunity for Salem to enhance transparency and community engagement by expanding external communication efforts and leveraging multiple channels to keep both staff and the broader community informed and involved in strategic initiatives.
- Salem tracks progress on strategic goals using quantitative metrics such as program attendance, circulation, visits, and volunteer hours, alongside qualitative feedback. Peer libraries use a broader mix of quantitative and qualitative data, including outreach metrics for diverse language groups, community survey results, QR code feedback during programs, anecdotal evidence, and formal key performance indicators (KPIs) reported regularly to boards and city councils. Several peers also plan to enhance data collection methods following strategic planning efforts. This indicates an opportunity for Salem to expand its performance measurement framework by incorporating more targeted community feedback tools and formalizing KPIs to better capture the impact and equity of library services.

Services

- Salem prioritizes programs using a point system that evaluates staff time and community impact, with a focus on maintaining core services and high-demand programs. However, outreach and additional programming are frequently reduced due to resource constraints. Peer libraries tend to prioritize through strategic plans shaped by community input and equity frameworks, with clear recognition of the need to discontinue lower-priority activities when resources are limited. They also leverage nonprofit funding and involve boards and leadership teams in setting goals that guide resource allocation.
- Salem addresses equity through an internal inclusion and diversity committee that focuses on underserved populations, employs bilingual staff, and conducts targeted outreach and programming as staffing capacity permits. Peer libraries demonstrate similar approaches by offering multilingual materials and programs informed by community language data, partnering with social service agencies, and engaging in cross-sector problem-solving groups. They actively work to diversify their workforce, simplify access processes, and embed equity frameworks into decision-making, often providing stipends to community members for feedback to ensure authentic engagement. Salem could strengthen its equity efforts by expanding community partnerships, formalizing equity frameworks, and enhancing outreach to diverse populations through sustained, intentional initiatives. However, Salem meets peer standards, especially considering its limited staffing.

Volunteer Management

- Salem's volunteer roles primarily include shelving, shelf reading, preparing materials, and program support. The Library places a strong emphasis on protecting patron data and privacy, which restricts some tasks. While peers also emphasize data privacy, they tend to expand volunteer roles beyond traditional tasks to include maker space support, story time facilitation, digital assistance, homework help, data analysis, and outreach event support. This highlights an opportunity for Salem to strengthen its volunteer program by establishing a dedicated volunteer management position and broadening volunteer responsibilities to enhance impact.
- Salem faces volunteer retention challenges due to high turnover and lack of centralized coordination, whereas peer libraries typically maintain dedicated volunteer coordinators or supervisors who manage recruitment, scheduling, and engagement.
- Peer libraries enhance volunteer retention by formalizing recruitment with interviews, providing comprehensive training, using specialized software to streamline processes, aligning volunteer roles strategically, and fostering engagement through recognition and feedback. Salem could improve by adopting centralized, structured approaches and strengthening volunteer recognition initiatives.

Appendix B: Resource Allocation Framework Tools and Templates

Introduction

This appendix provides a set of practical tools and templates designed to support the Library in implementing a resource allocation framework like the one outlined in [Recommendation 1](#). Recognizing the Library’s current resource constraints, these materials are intended to be adaptable and scalable, allowing staff to apply them incrementally as capacity allows.

The tools included here correspond to the critical elements of the framework:

- **Minimum Service Level Definitions** to identify and maintain foundational service commitments.
- **Community Engagement Plans and Feedback Logs** to systematically gather and track input from diverse community members.
- **Key Metrics Dashboards** to facilitate routine collection and review of quantitative data that inform resource decisions.
- **Strategic Alignment Matrices** to ensure all programs and services support the Library’s mission and equity goals.
- **Performance Indicator Tracking Tables and Resource Adjustment Forms** to monitor outcomes and document responsive changes.
- **Weighted Prioritization Tools** to guide transparent, balanced, and data-informed resource allocation decisions.

The Library is encouraged to use these tools flexibly, starting with those that address the most immediate needs and gradually expanding their use as resources and capacity grow. Together, these templates provide a foundation for more strategic, equitable, and impactful resource allocation aligned with community priorities and organizational goals.

Minimum Service Level Definitions

The following is an example of a basic Minimum Service Level Definitions Template which can be used to formally document minimum service commitments. The examples included in the table are for illustrative purposes only and do not represent actual recommendations.

SERVICE ELEMENT	MINIMUM STANDARD/ LEVEL	RESPONSIBLE STAFF	REVIEW FREQUENCY	NOTES/ ADJUSTMENTS
Branch Open Hours	Minimum 40 hours/week at Downtown branch	Customer Experience Supervisor	Annually	
	Minimum 20 hours/week at West Salem branch	Customer Experience Supervisor	Annually	

SERVICE ELEMENT	MINIMUM STANDARD/ LEVEL	RESPONSIBLE STAFF	REVIEW FREQUENCY	NOTES/ ADJUSTMENTS
Essential Staffing	Minimum 9 staff per shift	Customer Experience Supervisor	Quarterly	
Access Points	Maintain 3 annex locations	Youth Services Manager	Annually	
Program Baseline	At least 5 recurring programs/month	Youth Services Manager	Quarterly	

The following set of questions can be used to support regular review of core priorities, to promote ongoing alignment with operational realities and community expectations:

- Are minimum service levels currently met?
- Have community expectations shifted?
- Are adjustments needed due to staffing/resource changes?
- Has leadership approved any changes?

Conducting Systematic Community Engagement

The following is an example of a Community Engagement Plan Template which can be used to schedule and organize diverse community input activities that inform resource allocation decisions. The examples included in the table are for illustrative purposes only and do not represent actual recommendations.

ENGAGEMENT ACTIVITY	FREQUENCY	TARGET AUDIENCE	METHOD (SURVEY, FOCUS GROUP, FORUM, ONLINE)	RESPONSIBLE STAFF	OUTCOME/ USE OF INPUT
Annual Community Survey	Annually	General public	Online survey; may be part of the City's resident satisfaction survey	Customer Experience Supervisor	Inform strategic priorities
Focus Groups with Underserved Populations	Biannually	Specific demographic groups	In-person/virtual focus groups	Customer Experience Supervisor	Identify access barriers
Public Forums	Quarterly	All community stakeholders	In-person forums	City Librarian	Discuss service changes
Online Feedback Portal	Ongoing	All users	Website feedback form	Customer Experience Supervisor	Continuous input collection

The following is an example of a Community Feedback Tracking Log that can be used to systematically record, monitor, and respond to community input over time. The examples included in the table are for illustrative purposes only and do not represent actual recommendations.

DATE	ENGAGEMENT TYPE	KEY FEEDBACK THEMES	ACTIONS TAKEN/ PLANNED	COMMUNICATION BACK TO COMMUNITY (Y/N)	NOTES
4/15/2023	Focus Group	Need more weekend hours	Adjusted branch hours pilot program	Yes	
6/1/2023	Survey	Interest in digital literacy programs	Added three new digital classes	Yes	

Engaging in Data Driven Analysis

The following is an example of a Key Metrics Dashboard with Sample Metrics, which can be used to routinely collect and review quantitative data that inform resource allocation and prioritization decisions. The examples included in the table are for illustrative purposes only and do not represent actual recommendations.

METRIC	DESCRIPTION	DATA SOURCE	FREQUENCY OF UPDATE	RESPONSIBLE STAFF
Program Attendance	Number of participants per program	Program registration	Monthly	Youth Services Manager
Circulation Figures	Number of items checked out	Library system	Monthly	Customer Experience Supervisor
Digital Resource Usage	Downloads/streams of digital content	Digital platform	Monthly	Access and Acquisitions Supervisor
Branch Foot Traffic	Number of visitors per branch, potentially evaluating traffic per hour	Door counters	Weekly	Customer Experience Supervisor

The following is an example agenda for a regular data review meeting, which can be used to guide discussions that analyze data trends and inform resource allocation adjustments:

- Review key metrics trends since last meeting
- Identify low-utilization services or programs
- Discuss potential causes and opportunities
- Propose resource reallocation or program adjustments
- Assign action items and deadlines

Aligning with Strategic Goals

The following is an example Strategic Alignment Matrix, which can be used to map programs and services to strategic goals and equity commitments, helping to prioritize resource allocation accordingly. The examples included in the table are for illustrative purposes only and do not represent actual recommendations.

SERVICE/PROGRAM	STRATEGIC GOAL(S) SUPPORTED	EQUITY COMMITMENT ADDRESSED	PRIORITY LEVEL (HIGH/MED/LOW)	NOTES
Early Literacy Program	Increase accessibility of services	Serve underserved children	High	Aligns with community input
Partnership with Schools	Cultivate impactful community partnerships	Promote educational equity	Medium	Needs more volunteer support

The following is a Strategic Plan Review Checklist that can be used to periodically evaluate whether resource allocations remain aligned with evolving strategic priorities:

- Are current goals still relevant to community needs?
- Have any new priorities emerged?
- Are resource allocations reflecting these goals?
- Is communication about strategic priorities consistent across staff?

Conducting Ongoing Monitoring and Adjustment

The following is an example performance outcome tracking table, which can be used to monitor progress against KPIs and identify areas needing attention or adjustment. The examples included in the table are for illustrative purposes only and do not represent actual recommendations.

INDICATOR	TARGET/ BENCHMARK	CURRENT STATUS	LAST REVIEWED	RESPONSIBLE STAFF	NOTES/ACTIONS NEEDED
Community Satisfaction	≥ 85% positive in annual survey	82%	3/1/2025	Customer Experience Supervisor	Plan additional engagement
Program Attendance Growth	+5% per quarter	+3%	3/1/2025	Youth Services Manager	Explore marketing improvements
Volunteer Hours Contributed	500 hours/month	450	3/1/2025	Volunteer Coordinator	Recruit more volunteers

The following is an example Resource Adjustment Request Form, which can be used to formally document proposed changes to resource allocations, including justification and impact assessment.

The examples included in the table are for illustrative purposes only and do not represent actual recommendations.

DATE	REQUESTED CHANGE	REASON/ JUSTIFICATION	IMPACT ON CORE SERVICES (Y/N)	COMMUNITY INPUT REFERENCED (Y/N)	APPROVAL STATUS	NOTES
4/10/2025	Increase weekend hours at Branch A	High demand from survey and usage data	No	Yes	Pending	Pilot for six months

Establishing a Weighted Resource Allocation Prioritization Tool

The following tool is an example of a structured approach to evaluating and prioritizing service options by scoring them across multiple weighted criteria. The examples included in the tables are for illustrative purposes only and do not represent actual recommendations.

Step 1: List Service/Program Options

This step is used to identify and describe all service options under consideration for resource allocation.

SERVICE OPTION	DESCRIPTION/NOTES
After-School Program	Target underserved youth
Weekend Branch Hours	Extend branch hours on weekends
New Annex Location	Add book pick-up/drop-off location

Step 2: Score Each Option on Key Criteria (1 = Low, 5 = High)

This step involves scoring each service option across multiple criteria to evaluate their relative merits.

SERVICE OPTION	COMMUNITY NEED	STRATEGIC ALIGNMENT	STAFF CAPACITY IMPACT	USAGE/ DATA INDICATORS	PARTNERSHIP/ VOLUNTEER SUPPORT	OPERATIONAL FEASIBILITY
After-School Program	5	4	3	4	3	4
Weekend Branch Hours	4	5	2	5	2	3
New Annex Location	3	3	1	2	4	2

Step 3: Apply Weights to Criteria

This step assigns relative importance to each criterion to reflect organizational priorities.

CRITERION	WEIGHT (%)
Community Need	30%
Strategic Alignment	25%
Staff Capacity Impact	20%
Usage/Data Indicators	15%
Partnership/Volunteer Support	5%
Operational Feasibility	5%

Step 4: Calculate Weighted Scores and Rank

This step calculates weighted scores to produce a prioritized ranking of service options.

SERVICE OPTION	WEIGHTED SCORE	RANK
After-School Program	4.05	1
Weekend Branch Hours	3.85	2
New Annex Location	2.45	3



Salem Leadership Team Audit Update – Jan 5, 2026

Leadership Team Audit Background

The City went through a leadership audit in 2024 to assess how the executive leadership team operates and supports the organization’s effectiveness. A draft of the audit was released in December 2024, and the final results were published in February 2025. The audit included nine findings and recommendations.

Through the budget and levy process, the City committed to the community and the 2024 Efficiency Committee that it would be accountable for explaining how the findings and recommendations were addressed and for providing updates on implementation progress.

We’ve continued our performance auditing program. The City Council’s Finance Committee is leading accountability for and prioritization of the performance audits. <https://www.cityofsaalem.net/government/efficiency-and-effectiveness-measures>

Below are the nine recommendations and the changes implemented by the City.

Leadership Audit Findings, Recommendations, and City Response

	Finding	Recommendation	Changes Implemented
1	The span of control for City and department leaders is unsustainably high which contributes to necessary tactical management of functions and challenges in effectively preserving and managing leadership capacity.	The City should reevaluate its organizational structure to reduce the span of control for department and City leaders, and emphasize delegation of tasks to appropriate personnel, balanced workload distribution, and renewed focused on strategic oversight of functions.	Under the current organizational structure, the City Manager has nine direct reports. The City has strong, highly competent department directors and a City Attorney/Deputy City Manager who are skilled professionals successfully managing day-to-day operations. As a result of this structure and the leadership team’s collaborative approach, the City Manager is able to focus primarily on strategic priorities, with limited involvement in routine operational matters.
2	The City Manager’s Office has two executive assistants whose workloads are unevenly and ineffectively distributed, resulting in potential inefficiencies.	The City Manager’s Office should conduct a workload assessment and implement a more balanced distribution of tasks, ensuring that administrative responsibilities are	The City has addressed this recommendation through changes in responsibilities among key staff. These adjustments have been effective in balancing workloads and ensuring that administrative tasks are delegated appropriately.

		delegated effectively among both assistants	
3	The City has two high-level strategic team members who manage multiple responsibilities with limited resources, which limits their efficacy and creates operational continuity risks.	The City should assess the responsibilities of the Strategic Initiatives Manager and Homelessness Liaison and Human Rights and Federal Compliance Manager, and realign them with their high-level roles by providing additional resources for administrative tasks and/or removing organizational barriers to enhance their access to and focus on strategic initiatives.	Through organizational restructuring, the City transferred three positions from other departments to provide additional administrative support and better align roles and responsibilities with strategic functions. These changes will streamline workflows, reduce administrative burden, and allow these positions to focus more effectively on high-level strategic initiatives once filled.
4	The City Manager's Office lacks specified communication personnel, which prevents the city from achieving a centralized communication function that would align external communications across city departments	To enhance collaboration and alignment of external communications across all city departments, the City should explore opportunities to: A. Hire dedicated communication personnel within the City Manager's Office to execute communications strategies, and B. Rebalance job responsibilities across current staff to ensure accountability for city-wide communication.	The City is in the process of consolidating communications and community engagement functions from multiple departments into a single Communications and Engagement section to improve coordination and consistency. As part of this effort, the existing Public Information Officer position was reclassified as a Communications and Engagement Supervisor role. This approach strengthens citywide communication capacity, provides clearer oversight, and improves alignment across departments, without adding any new positions.
5	Decisions are made using unclear processes and are inconsistently communicated to impacted personnel.	The City should develop a decision-making framework that guides decision-making processes and subsequent	The City has developed a Service Delivery Strategy that includes a framework to guide decision-making, align staff and resources, and shape how initiatives are implemented. The framework has already been applied

		communication to impacted individuals	across several initiatives, and early feedback indicates it is working effectively.
6	ELT meeting practices, including agenda setting, meeting cadence, audience selection, engagement in discourse, and follow-up mechanisms are opaque and result in inefficiencies.	The City should establish clear guidelines for ELT meeting practices, including standardized agenda-setting processes, defined meeting cadences, appropriate audience selection, structured discussion techniques, and consistent follow-up mechanisms.	Input from the leadership team was gathered to assess current practices, and improvements were implemented based on that feedback. The City continues to refine these changes as they are implemented.
7	The City does not have an effective way to track initiatives and work deemed as high priority to the City, the parties responsible for executing them, and their progress.	The City should seek to implement a centralized project management system that allows for the tracking of high-priority initiatives, assigns responsible parties, and monitors progress and incurred costs in real-time.	The City has strong project management practices within many work groups. However, there remains a need for a centralized initiative tracker to support broader, multi-department responses to Council and community priorities.
8	Due to inconsistent pre-meeting briefings, short turnaround times on council packets, and a lack of committees, Council meetings can be long and focus on details rather than strategic, policy-oriented discussions	The City should work to enhance council meeting processes such as providing council meeting packets earlier, offering briefings to ensure council members are well-prepared, and revitalizing the use of committees to facilitate thorough discussion and decision-making.	Several improvements have already been implemented. Council now receives advance summaries of upcoming agendas, including responses to questions raised by Councilors. The City has also improved information-sharing practices by distributing materials consistently to all Councilors to ensure equity, transparency, and fairness in access to information.
9	The City does not have an effective system for managing constituent requests, making it	The City should implement a centralized request management system that streamlines	A simple technology solution was developed internally, and staff from the CSC, CMO, and Communications Team have begun using it. The City

	difficult to uphold the one-hour staff time rule required by the Salem City Charter.	the process for tracking, prioritizing, and responding to constituent inquiries.	also plans to implement a centralized request management system in fiscal year 2027–2028.
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City of Salem Service Delivery Strategy

In 2024, the City of Salem conducted a comprehensive leadership audit to assess how the executive leadership team operates and supports the organization's effectiveness. The audit, finalized in February 2025, provided critical insights into organizational strengths and areas for improvement. Building on these findings, the City's leadership team identified key organizational risks in July 2025 and gathered perspectives from managers across all departments. This work laid the foundation for the City of Salem Service Delivery Strategy, *a structured framework that outlines how the organization delivers services efficiently while meeting community expectations and organizational objectives.*

Key Organizational Risk Areas (what we need to address)

Three primary organizational risk areas were identified:

- One City / Enterprise Thinking
 - Building on the One City approach, or enterprise thinking
 - Aligning strategy with day-to-day operations
- Organizational Change Management
 - Building capacity and managing change
 - Improving employee and community engagement
- Financial Resilience and Workload Sustainability
 - Addressing long-term budget and funding challenges
 - Sustaining workloads

Other areas identified include workforce and talent management, communication and public engagement, and organizational structure and culture.

To address these risks, we established our guiding principles and a framework to align decision-making, staff and resources, and guide our approach to work and new initiatives.

Guiding Principles (how we show up)

These principles shape how the city shows up for its employees, residents, and partners:

1. **We Care** – Prioritize the well-being of employees and the community
2. **Engagement** – Keep peers and the community at the center of decision-making
3. **Data-Informed Results** – Use evidence and metrics to drive decisions and improve outcomes
4. **One City** – Promote enterprise thinking and cross-department collaboration
5. **Innovation** – Embrace creative solutions and continuous improvement
6. **Trust** – Build and maintain confidence through transparency and accountability

Organizational Framework: Vision, Alignment, and Action (how we operationalize it/ the blueprint)

Deliver high-quality and sustainable services by working together as **One City**, guided by shared values and a commitment to our community.

1. One City / Enterprise Thinking

Vision: Working together toward a shared vision

Alignment: Shared recognition of issues and common goals

Action: Comprehensive and coordinated response as One City

2. Organizational Change Management

Vision: Engage employees and community, considering multiple perspectives, and centering decisions around community impact

Alignment: Navigate uncertainty, keep processes consistent, and pace change appropriately.

Action: Pilot new approaches: try small, learn fast, and adjust

3. Financial Resilience and Workload Sustainability

Vision: Ensure long-term financial stability and sustainable workloads

Alignment: Limit new services to those with sustainable funding model and align staffing resources through reorganization

Action: Place the right people in the right roles to optimize capacity and resources.

Applying the Framework in Practice: Safe, Clean, Healthy Salem

The Safe, Clean, Healthy initiative provides a clear example of how the City's Organizational Framework for Change Management was applied in practice.

Vision: The initiative established a clear purpose focused on keeping the community safe, clean, and healthy while engaging employees and partners in its implementation. Decisions were informed by multiple perspectives, with community impact at the center.

Alignment: The initiative was coordinated with community engagement, assessment of staff capacity and operational realities, and City Council processes ensuring that goals were achievable, and change was paced appropriately.

Action: The program was piloted in targeted areas using a “try small, learn fast, adjust” approach. This allowed the City to implement practical solutions, evaluate outcomes, and adapt strategies before scaling or expanding the initiative.