



Board Report

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**EXECUTIVE MANAGEMENT COMMITTEE
OCTOBER 21, 2021**

**SUBJECT: RESPONSE TO MOTION 52 DOROTHY PEYTON GRAY TRANSPORTATION
LIBRARY AND ARCHIVE**

ACTION: RECEIVE AND FILE

RECOMMENDATION

RECEIVE AND FILE Response to Motion 52 Dorothy Peyton Gray Transportation Library and Archive.

ISSUE

This is in response to File #2021-0455 Agenda Number 52, Motion by Directors Garcetti, Najarian, Barger, Butts, Sandoval, and Dupont-Walker instructing staff to report back with an update on an assessment and action plan for the Dorothy Peyton Gray Transportation Library and Archive. This report provides an assessment on the Library and Archive's current operations, opportunities, and challenges. It also includes an action plan to help maintain and strengthen the Library and Archive's contributions to Metro's core functions and mission.

BACKGROUND

The Dorothy Peyton Library is a transportation research library with a collection of Metro's own plans, documents, studies, reports, and publications as well as reference materials on a range of transportation and related topics. The Library offers staff, outside researchers and the general public access to a mix of print and digital resources. 40% of the collection is unique and cannot be found anywhere else. The Library also offers in-house research services.

The Archive is tasked with cataloguing and curating historically and culturally significant materials to document how transportation has helped shape the Los Angeles region over time. The Archive contains records from predecessor public and private transportation agencies, as well as donations from employees, estates, and elected officials. The collection dates to 1873.

DISCUSSION

Assessment

Current Functions & Benefits of the Library and Archive

The Library and Archive advances Metro's mission of world-class transportation by providing information services to individual Metro projects/programs and to the public (transportation scholars, etc.), which benefits decision-making and transportation outcomes. Examples of projects and work that have relied on the library for critical information are the following:

- The Fareless System Initiative - relied upon timely and expert information provided through reference requests on all aspects of fareless transit
- Preparation for the 2028 Olympics - referenced materials on the lessons from the 1984 Olympics that were catalogued by the library
- Pedestrian improvements from Union Station through El Pueblo to City Hall - relied upon research from the library of how to pursue such a project
- Transition to Fare Gates - research synthesis on barrier vs. barrier free fare collection conducted by the Library team
- Transit Courts - conducted national scan of case studies on transit agency transit courts
- Customer Code of Conduct - national scan of customer codes of conduct to inform Metro's ordinance
- Federal CNG Tax Credit - research on qualifications ultimately resulting in CNG tax credit producing \$12M in new revenues

The Library and Archive is currently staffed with 1.5 FTEs, two temporary, one contractor and one intern. The Library and Archive offers information assistance to Metro staff and the public. The team also manages and develops a collection of print and digital transportation-related resources that capture lessons of past transportation trends and are aligned with Metro's current trends and directions for the future. Additionally, the staff manages a variety of multimedia communications channels with the goal of promoting the library's collections and services and advancing knowledge of transportation. This includes curating a daily Los Angeles Transportation Headlines circular, hosting a Primary Resources Blog, hosting a Flickr page with historical photos, managing social media channels like Youtube, Twitter, and Facebook, as well as digital libraries for employees from the National Technical Information Service, Transportation Research Board's Transportation Research Record, EBSCO's Leadership and Management Library, and soon, the Knovel Engineering Technical Library.

Size and Reach of Library and Archive

In FY21, the Library and Archive set a record of 12.5 million internet interactions across all of their digital assets. Previous years had averaged 8-10 million interactions. The majority of these interactions are through their social media accounts, such as Twitter.

Asset	# of Interactions	Percent
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Digitized collections	13,260	0.1%
YouTube Videos	422,000	3.4%
Flickr Photos	2,280,885	18.2%
Twitter	8,493,305	67.9%
Facebook	1,129,553	9.0%
Primary Resources	31,909	0.3%
Transportation Headlines	120,433	1.0%
Metro.net	8,567	0.1%
intranet	Unknown	0.0%
Total	12,499,912	100%

FY21 year-end metrics showed that 120 reference questions were answered, 354 traditional prints of books/reports went through circulation, and 380 were circulated through digital versions in the library catalog. The library catalog had searches from 757 unique users. It also had 13,260 document downloads through its web collections. Due to the pandemic, the physical location of the library was closed and no changes were made to the library catalog. It is estimated that approximately three-fourths of the reference questions come from external/public users, and the majority of the online interactions are also with members of the public.

A 2017 survey of 365 Metro staff respondents showed that 70% reported visiting or contacting the Library for multiple reasons, and 30% reported not having used the Library's services or collections in the past five years. The majority of the 70% were staff from the Operations department. An example for how the Library and Archive team assists the Operations staff is through its maintenance of the original Reserve Service Area map documentation that is required per the 1975 Transit Development Act. Service Planning uses this when negotiating route changes with Metro's municipal partners. Additionally, the Library supports Operations by providing access to system timetables and maps that date back to 1950s, as well as examples of performance measures data that date back to the 1960s. This data suggests the library has cultivated a small, loyal customer base within Metro. More can be done to build awareness of the array and value of its services across all of Metro's business units.

With current staff, the Library and Archive team is able to conduct trainings and presentations to internal employee groups or staff meetings about twice per year. Presentations to external constituents average around six per year. This does not include past year conference presentations, which the Library and Archive team will do by request. Examples of past presentations include speaking on local planning history to the Asuza Historical Society, Glendora Historical Society, and Huntington Library, presenting on urban planning to UCLA, UCI and UCSB, and speaking on the history of West Santa Ana Branch corridor to EcoRapid board.

The Metro Library and Archive collection is estimated to contain 250,000-275,000 items. The Archive has cataloged about 20,000 records of historic artifacts, photographs, films, videos, deeds, maps, documents, news and newsletter articles, contracts, and historical records that document Los

Angeles transit history from 1873 to the present. The Library catalog currently contains about 50,000 records. Additionally, about 20% of the 50,000 library shelf collection items have been digitized, or approximately 10,000 items. The Library and Archive team is currently able to digitize assets at a rate of 1% per year due to limited staff capacity while its backlog of uncatalogued items continues to grow.

Benchmarks with Other Transportation Libraries

Library	Annual Org. Budget	Total FY21 Library Budget	Contract/Temp. Budget	FTE Salaries	Staff Allocation	FY21 Reference Requests
LA Metro Dorothy Peyton Library	\$8B	\$778k	\$153k	\$234kK	1.5 FTE 1 intern 2 temporary 1 contractor	120
Wisconsin DOT Library	\$2.88B	\$100k	\$0K	\$85K	1.5 FTEs	498
Cal Berkeley ITS Library	n/a	\$374k	\$0K	\$205k	3 FTEs	17

The above table shows other transportation research libraries that have produced leaders on the national level in library science. The metrics in the above table are illustrative of how other transportation libraries allocate budget and staffing. The Dorothy Peyton Library currently allocates a greater share of funding to contract and temporary staff compared to these peer organizations.

Limitations & Constraints of Library and Archive

Succession Planning and Staffing: The Library and Archive currently has 1.5 FTEs, and these staff will all likely be retiring by 2024. There are currently no full-time staff to replace these FTEs in leadership and service, which leaves the Library and Archive with no viable succession plan. The complex, interdisciplinary nature of transportation requires at least two years of subject specialization for professional librarians and archivists to achieve fluency with the collections and other resources, and temporary or contract staff positions are not designed for this type of work, and Metro policy on temporary staffing limits their service time. This has not allowed staff to advance priority strategic initiatives, or prepare the Library and Archive to be future-ready.

Need for Increased Digitization of Resources and Data Governance Policy: One of the goals of the Library and Archive is to meet the increasing demand for digital content by digitizing more of its assets. This need has been echoed by various Metro departments that are adjusting to a future that includes more telework. The need for a digital archival system is even more pronounced given the recent overhaul of the Metro website. Before the launch of the 'lifeboat' site, *Metro.net* had become a default storage for Agency public documents.

A summary of the assessment is as follows:

- The Library and Archive offers information assistance to Metro staff and the public and strives to provide information faster, better, and cheaper.
- There is still a shortfall in its efforts to build awareness of the array and value of its services across all of Metro's business units and the public
- The data suggests there has been a higher demand for downloads and digital resources over the past few years, but the Library and Archive has not been able to meet that demand.
- The Dorothy Peyton Library currently allocates a greater share of funding to contract and temporary staff compared to others.
- There is no current succession plan for FTE's that are retirement eligible by 2024.

Action Plan

Staff has identified a series of initiatives for how the Library and Archive can improve access to its resources, contribute to Metro's mission and core business, and grow its presence within the agency and the communities we serve.

Oral History Program: During the Voluntary Separation Incentive Program process, HC&D created a knowledge transfer library and interviewed individuals that were leaving the agency for knowledge retention. There is not, however, a general exit-interview and oral history process. The Library and Archive has identified capturing the narratives and experiences of key Metro leaders and policy makers, such as Board deputies, past Board members, executives, long-serving bus operators, etc., with a focus on Diversity, Equity and Inclusion in prioritizing oral histories as an invaluable source of information and perspective relevant to Metro's history and legacy. A natural partnership exists between HC&D and the Library and specifically, with Talent Development, for an oral history program.

School, workforce, and community programming: With appropriate resources, the Library and Archive can drive more awareness of and understanding for how to utilize the information services Metro offers to its current workforce, a pipeline of future transportation workers, and community partners. Metro has several work streams dedicated to cultivating the next generation of transportation workers. Examples of upcoming programs are the Seed LA School, Metro Teacher Externship Program, and the Metro Youth Career Experience. NextGen Workforce Programs such as the Transportation Career Academy Program (TCAP), Metro Internship Program (MIP), and Entry Level Trainee Program (ELTP) already take advantage of the Library.

The Library & Archive staff has experience contributing to transportation curriculum development and providing trainings on research skills, and there is opportunity for partnerships between HC&D and the Library and Archive. Additionally, the Library and Archive can pursue partnerships with schools and community organizations to help inform and educate youth and residents about LA's transportation history and trends. equity in the dissemination of this resource. These partnerships will prioritize institutions in equity focus communities. The Library and Archive staff can track and monitor demographics of program participants and Oral History Program interviewees to ensure there are not disparities across race, socio-economy, and gender.

Increased Digitalization: In order to meet the increased demand for digital resources, the Library and Archive should accelerate the digitalization of its existing collection. This need has been echoed by various Metro departments that are adjusting to a future that includes more telework. Metro should also advance an enterprise-wide data governance policy, which should require all relevant data and publications to be 'deposited' in the library and/or archives, further growing the digital collection. (See the next recommendation for additional details on data governance.)

Creation of Data Governance Policy. Goal 5.3 of Vision 2028 calls for a data management policy, and the Metro Recovery Task Force also recommended the need to better collect and share data with staff and the public. The need for a digital archival system is even more pronounced given the recent overhaul of the Metro website. Metro should advance an enterprise-wide data governance policy that is effective, upheld, and enforced across the agency. All Metro departments and business units produce, manage, analyze, and/or store some kind(s) of data. However, these individual systems are largely left up to each department or unit's own use case and are not necessarily compatible with one another. Their contents are also not widely shared between departments, which creates inefficiencies and redundancies in workflows due to inadvertent duplication of data and time spent identifying whether a particular data source exists. Given their expertise in knowledge management, such as ontology, taxonomy and archiving, the Library and Archive staff, as well as RRIM, should have a role in conceptualizing and informing any data governance policy and program. A robust and well-enforced data governance policy will ensure the Library and Archive receives more streamlined, refined assets and data from all departments and will make the collection more comprehensive into the future.

Philanthropic Funding for Programming: A review of Metro's grants database shows that Metro has not received any philanthropic funding in recent years. However, Metro's portfolio is diverse and Metro's Federal/State Policy and Programming team is currently working on the process for managing discretionary grants applications for the agency, including discussing philanthropic sources. A scan of potential philanthropic funding sources has shown that most do not cover operations (including staffing) as an eligible expense, but will support archiving and cataloging of unique projects. The Metro Library and Archive team currently subscribes to resources that promote such opportunities, and they can work with relevant staff to pursue philanthropic opportunities to expand programming. As with all discretionary funding sources, Metro staff should assess not only the eligibility and alignment of the philanthropic funding sources with the work of Metro's Library and Archive, but also the overall value of any potential philanthropic grant considering any risks or burdens that the grant terms and requirements may impose on the agency.

Target KPIs

The Library and Archive staff will work with the Board Clerk to set targets demonstrating how expanding staffing would enable their business unit to provide greater support to core Metro functions and further advance Metro's mission of world class transportation. These key performance indicators should include expansion of existing tasks, and when appropriate, can also include new programming. For example:

- Conduct trainings to reach 100 staff annually, including staff from all ten departments by 2024;
- Increase digitization of physical assets from current 20% level and 1% annual rate to 5% annual rate, which would enable digitization of 50% of physical assets by 2028;
- Increase interactions with assets (digitized collections, Flickr photos, primary resources blog, transportation headlines, etc.) from 12.5 million to 15 million by 2024;
- Double annual circulation (print and digital) from approximately 750 to 1500; annual library catalog searches from approximately 750 users to 1500 users; and document downloads from approximately 13,250 to 25,000. Achieve these goals by 2028;
- Increase reference questions received and answered from staff and public from 120 annually to 200 annually by 2024 and 500 annually by 2028; and
- Develop and launch a community and school outreach program with a focus on organizations in equity focus communities. Set target of reaching 10 organizations and/or schools annually through tours, displays, and other partnerships.

Organization and Staffing

To ensure the Library and Archive can succeed in fulfilling its role as a research institution and effectively contribute to Metro's core business and mission, the CEO changed the reporting function of the Library and Archive Unit to the Board Clerk to align Board Administration as the keeper of the record for Metro's legacy and history, and to facilitate better collaboration.

To provide immediate support, the CEO has authorized two new FTE's to support succession planning. Once the analysis of the target KPIs is completed with the Board Clerk, staff will analyze the need for additional staffing support as part of the FY23 Budget Development process that begins this Fall. Having adequate staffing is the key to increased digitization of resources, increasing trainings will allow more staff the knowhow to use the Library and Archives and can improve Metro projects and operations, and increasing community and school partnerships can improve community access.

FINANCIAL IMPACT

Receiving and filing staff's response to Motion 52 Dorothy Peyton Gray Transportation Library and Archive has no impact to budget. However, any future recommendation for additional FTEs will take the appropriate steps to analyze the financial impact to the agency.

EQUITY PLATFORM

The recommended action plan includes increasing community and school partnerships and programming, with a focus in EFCs. Program offerings can include curriculum development around transportation and Los Angeles history, free trainings on transportation research skills, and increased awareness of the array and value of the Library's transportation-research services. For example, the

Library staff has previously consulted on curriculum development and a reading list for the Renaissance Academy Urban Planning High School Program. Similar efforts can drive more awareness of and increase accessibility of the Library and Archive for EFC program participants. Students that otherwise would not be familiarized and oriented to the transportation-related resources offered by the Library and Archive would get exposure to these resources. The proposed Oral History Program would prioritize diversity, equity, and inclusion representation of individuals to capture their lived experiences working for Metro. This Program can help document and capture the perspectives and experiences of individuals whose stories might otherwise not be shared publicly. The interviews should be easy to find and access. To the extent possible, staff recommends the Library and Archive staff can track and monitor demographics of program participants and Oral History Program interviewees to ensure there are not disparities across race, socio-economy, and gender.

IMPLEMENTATION OF STRATEGIC PLAN GOALS

The assessment and recommended action plan supports strategic plan goals 1, 4, and 5. The action plan helps support and inform project planning and operations, supports applying resources towards regionally and nationally-significant historical materials and partnerships to advance the understanding of transportation, and provides for sustainable staffing and succession planning.

NEXT STEPS

The Library and Archive team will work with the Board Clerk to further flesh out the recommended action plan, including additional analysis around budget impacts and FTE requests.

ATTACHMENTS

Attachment A - File 2021-0455 Motion 52 Dorothy Peyton Library and Archive

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Board Report

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REVISED
REGULAR BOARD MEETING
JUNE 24, 2021

Motion by:

DIRECTORS GARCETTI, NAJARIAN, BARGER, BUTTS, SANDOVAL, AND DUPONT-WALKER

Dorothy Peyton Gray Transportation Library and Archive

In everything it does, Metro should always strive to be the best and most prestigious transportation agency in the nation.

Metro's Dorothy Peyton Gray Transportation Library and Archive is an exceptional institution and one of the most comprehensive transit operator-owned library resources in the United States. As Southern California's only multimodal transportation library, it serves employees, the public, governments, and research institutions with timely access to information supporting transportation policy, research, operations, and technology transfer. It is recognized for providing invaluable research, resources, history, and archives that give context to transportation issues and history in Los Angeles and Southern California as well as leadership within the transportation research community.

Approximately 40% of the Dorothy Peyton Gray Library's collection is unique. The library's team works with the National Transportation Library and the Transportation Research Board to improve the availability of transportation-related information needed by federal, state, and local decision-makers. The library partners with local, national, and international entities in cooperative ventures and information sharing.

The library has also developed a robust social media presence with its Primary Resources blog, Transportation Headlines blog, Flickr photo stream with thousands of unique historic images, and YouTube channel featuring historic films and videos.

However, the library's ability to continue providing these services is at risk. In the past decade, the library has operated largely on a shoestring. Its staff has declined to the point that it now has one dedicated full-time position, plus a small number of temporary and as-needed support staff. This level of staffing is insufficient for Metro to provide satisfactory customer service and further grow the library's presence and standing within Los Angeles County, the transportation and historical communities at large, and beyond. Additionally, in recent years the library has been reorganized several times into different departments and operating units within Metro, contributing to its challenges. As a result of these challenges, priority strategic initiatives have not been able to

advance, including digitization of the library's catalogue and archive.

To address these risks, Metro should perform a strengths, weaknesses, opportunities, and threats analysis (or equivalent) to determine the appropriate staffing, investment, technologies, organizational standing, and strategic partnerships for the Dorothy Peyton Gray Library to maintain and grow its standing and prestige.

Achieving and maintaining an exceptional library and historical archive is essential for Metro to provide transparency to its staff, stakeholders, and constituents.

SUBJECT: DOROTHY PEYTON GRAY TRANSPORTATION LIBRARY AND ARCHIVE

RECOMMENDATION

APPROVE Motion by Directors Garcetti, Najarian, Barger, Butts, Sandoval, and Dupont-Walker that the Board of Directors direct the Chief Executive Officer to:

- A. Develop a comprehensive assessment and action plan for the Dorothy Peyton Gray Transportation Library and Archive, including but not limited to recommendations for Board action on:
1. Short-, mid-, and long-term goals for the library to improve accessibility to its materials and grow its community presence;
 2. Appropriate permanent staffing and other investment to ensure achieving and maintaining an exceptional level of service and prestige;
 3. A permanent home within the Metro organization consistent with Metro's enabling legislation;
 4. Potential strategic partnerships to help the library grow its reach;
 5. Benchmarks against peer agencies and libraries;
 6. Any other relevant opportunities related to the library's mission, services, and standing; and
- B. Report back to the October 2021 Executive Management Committee with an update on all the above. Re: directive A.2 (FTEs), report back earlier than October 2021 as appropriate.

SOLIS AMENDMENT: The report back should include an exploration of philanthropic funding to help support the library's operations.