



# Metropolitan Library System

## Strategic Planning Feedback Summary

The Metropolitan Library System has received feedback from membership and staff since the planning process began in May 2008. The feedback process took two primary forms: focus groups to validate or challenge the Strategic Initiatives developed by the MLS Board Planning Committee and an Annual Meeting Summit where members, staff, and MLS Board members discussed specific projects under the Initiatives, as well as success factors for those Initiatives.

Below is a summary of the feedback gathered under each Initiative. This data is being used by the MLS Executive Team and Board Planning Committee to craft the Strategic Plan for FY2010-2012 and its companion Operations Plan.

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### Foster Advocacy

#### *Key Concepts from the MLS Board Planning Committee*

- Contact with legislators and assisting members in connecting to representatives at all levels.
- Leadership in marketing libraries to local and regional government bodies and communities.
- Host advocacy education and events.

#### *Focus Group Feedback*

It is important that marketing efforts and training are used for librarians, communities and legislators to understand the value libraries offer to the local and regional government, thereby, becoming advocates and ambassadors for them.

Librarians understand that advocacy is an important element of their job. However, they want to be educated on how to connect with legislators and also how to leverage the power of a large group of libraries through workshops and media training.

“Advocacy is very important. It provides for other initiatives.”

MLS can act as a mediator to assist the library in providing information for a referendum (help make their case). Leverage volume of libraries to make appointments with legislators possible.

There was discussion around branding local libraries as a way of MLS assisting in marketing them. Overall, the consensus was the members consider MLS a valuable resource. They do recognize there are opportunities to better understand the legislative process at the local and state levels and would welcome talking points to prepare them to connect with them as well as local community groups.

They have stated that Trustees can serve as advocates for the local libraries and should be more active in the marketing process. Trustees of libraries should be active in their communities and other interactions advocating for the libraries. Appropriate training should be provided to them.

“MLS could provide a forum for information on (be involved in the vetting process) for Trustees and legislators.”

“Can Trustees promote libraries in their communities? They can share successes through mentoring (to be more effective at legislative days.”

“Advocacy training is important to me. How do we speak to legislators? How do we write letters? How do we go about making the call to the appropriate people?”

“Legislative breakfasts are important. They attract legislators. MLS does a very good job of planning these events.”

### *Annual Meeting Summit*

#### Projects and Concepts:

- Branding – work to create a collaborative, standardized library brand.
- Trustees – work to create standards and best practices. Set and communicate expectations. Develop a trustee certification program.
- Legislators – meet regularly and in a more standardized way. Don’t just depend on existing legislators, but encourage library trustees and staff to run for office.

#### Success Factors:

- Legislators contacting us as useful resources. Libraries get additional funding because they know our worth. Our librarians or trustees elected to higher offices. Branding – beyond books. Circulation for MLS goes up 10%. Young people know us. Adopted certification program. Active passionate involvement. Reduced turnover.

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### **Empower Learning**

#### *Key Concepts from the MLS Board Planning Committee*

- Affordable and accessible CE for library staff.
- Promote learning and a culture of learning within members and in system activities.
- Encourage diversity of knowledge and raise the level of expertise of member staff.

#### *Focus Group Feedback*

Consistent themes contain references to face to face, online and blended training, web casts, pod casts and the power of networking as key components of empowering learning. MLS can take more of a leadership role in virtual meeting offerings. If face to face meetings are held, the librarians request that the locations are varied and close to public transportation. There are opportunities to increase the communication of workshops available and the schedule. MLS could consider offering participation to non-members.

“MLS is doing a great job with content choices.”

“There is synergy among face to face meetings.”

“We need to be able to access workshops without being there physically.”

“Have training materials available for a period of time after the scheduled training has taken place.”

“Start having workshops/information for librarians on a fixed schedule.”

Some have attended MLS workshops and think they have been great. MLS can also develop more modules in-house. They are impressed with the way MLS reaches solo librarians.

## *Annual Meeting Summit*

### Projects and Concepts:

- Where learning comes from. Distributed.
- Create a knowledge inventory.
- Develop a method for informal information sharing.
- Understand the smaller library challenges. Use technology to overcome access issues.
- Assess and analyze data already gathered.
- Partnering on content if shared. Should we be the ones providing content?
- Look at external influences on providing seminars.
- What do the patrons need, want, Understand the audiences needs – content, timing. Etc.

### Success Factors

- Multiple formats – increase in number of events provided in multiple formats w. increased attendance. Assessment analysis – all CE offers attended. Costs are cut, more w/ less. More knowledgeable staff at member library. Outcome assessment. Using what is learned.

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## **Facilitate Knowledge Sharing**

### *Key Concepts from the MLS Board Planning Committee*

- Share intangible assets, leverage the diversity of staff in our member libraries, and facilitate mentoring and coaching.
- Facilitate communication to and between members and among member types.
- Continue within-type and cross-type knowledge sharing.

### *Focus Group Feedback*

MLS has been at its best in sharing intangible assets, leveraging diversity of staff, and facilitating mentoring or coaching through the Supervisors/Leadership Academy and management workshops which were good. MLS facilitating the mentoring, coaching and networking is the number one priority in this area. There have been opportunities for people to get to know each other and special interest groups, tech groups, circulation users group, and children's groups through MLS' initiative. This has provided opportunities for networking with these various libraries and library types.

Ideally, they would like a variety of librarians to be participants in the sessions. They think the member librarians are skilled to facilitate workshops and MLS should use them.

“Who needs the level of training and who can do it? People in the membership can do it.”

Good mentoring programs using specialties of membership can be leveraged to mentor others. The zones promote mentoring and the diversity of libraries brings value. The best opportunity has been at meetings where different libraries participate and there is an opportunity for networking, rather than just sitting and hearing the topic of the workshop; networking sessions with various libraries / library types.

More workshops should be further deployed and focus systems more on group education rather than individual with a series of topics to build skills, targeted to specific staff (cohort approach over 6 weeks) and with more opportunities to use web site links to other locations. It is important to identify special interest groups and keep the dialogue continuing. This can occur through small group discussions, and brown bags. MLS can mix up groups and share best practices.

“A directory with photos and bios of library staff for recognition would be good but would need to take safety precautions.”

“There should be more opportunities to bring stakeholders together. The MLS Summit was great.”

MLS is the top most entity and that requires it to do the overarching strategic communications piece. MLS is not timely in its communication. The communication received from MLS has been one way through emails, faxes, surveys to complete, etc. MLS needs to be able to discuss the information and value the administrators’ opinion by asking for their input. It is imperative when MLS wants them to take action on the web site (vote for Trustee) that the members should not have to go through 3 links to respond. Getting the publics and specials together is tantamount. There is so much to be shared but these groups are often separate rather than working together.

“MLS can be a catalyst to encourage discussions and facilitate discussions. Is there an assumption that everyone has the same opinion? That is not the case.”

### *Annual Meeting Summit*

#### Projects and Concepts:

- Establishment of Groups – Two-way community of practice interaction instead of one-way email.
- Mentors – e.g. technology, and topics – willing pool of mentors to help on area of expertise.
- Continuing Education assessed by MLS consultants – share across libraries. Emphasize what would be useful.
- Include ancillary departments – business office, etc, should be included.
- Best Practice access – Members, staff, vendors.
- Mentor – Match.com approach. Shadowing.

#### Success Factors

- Members better prepared with higher retention rate. Mentors pipeline. Identification of member strengths and Communities of Practice online.
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### **Enhance Resource Sharing**

#### *Key Concepts from the MLS Board Planning Committee*

- Maximize the impact of shared materials.
- Includes delivery and handling of physical materials.

#### *Focus Group Feedback*

Delivery services have been very good and requested materials are received in a timely manner.

Members think that SWAN is a valued resource. There is an opportunity to achieve more patron use of SWAN on the patron side. MLS has been at its best in maximizing the impact of shared materials when it has provided SWAN which is great and MLS needs to teach educators how to use SWAN in their curriculum. Support of SWAN helps work towards ILS with technology. Technology people are great.

Further deployment is needed to expand the ability to search. More work is needed on the patron side of SWAN. SWAN needs to be coordinated and marketed in a unified way.

Other options of mail and private services should be explored – UPS, DHL, USPS, FedEx., etc.

“MLS has provided SWAN – great!”

“There is a need to expand the ability to search.”

“The Chicago Public Library deliveries need to be better.”

## *Annual Meeting Summit*

### Projects and Concepts:

- Encourage, Develop- Access to catalogs. All libraries and patrons beyond local holdings.
- Coordinate ILDS delivery – esp. to Chicago libraries. Think of a new drop off point.
- Personnel Sharing. Smaller libraries may lose a Master Library Science staff and lose membership. Cooperative projects across system on projects.
- Explore alternative delivery. Fee based? 2 per day, UPS? Allow paying a fee if urgent need. Pay for use.
- Joint purchases of certain materials. Sharing databases.
- Digitization project. Store digital material. Process to have one vendor to digitize across members.

### Success Factors:

- Digitalization project – Yes on project. Seamless access to catalogs system or even state. Transparent to patron. Coordination. ILDS delivery successful. Measured by survey. Baseline for improvement.

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## **Ensure System Viability**

Note: The original Initiative was Ensure Viability, which changed after the focus group feedback was received.

### *Key Concepts from the MLS Board Planning Committee*

- Stewardship of fiscal resources to balance current responsibilities and need for growth.
- Broaden the view of what resources can be tapped to support system activities.
- Create a culture of funding and development to go beyond government resources.

### *Focus Group Feedback*

Other ways that MLS can tap into other resources available in the local area and the region are through local corporations, members' corporations, and partnerships with local education institutions. There are private funds available. The Donor's Forum Library is a spot for this research. Getting together with the other systems is another avenue making the funds more widely available. Other avenues of partnership should always be pursued. It is extremely important that the librarians begin working with their special library committees asking them to help them to get money from their entities for their members.

Economies of scale should be leveraged by working with library boards to encourage larger units of service to save money. Volume discounts are critical.

MLS' role in ensuring viability is important to their libraries regarding funds. MLS spent a great deal of time helping with the children's programming and funding sponsorships. Members appreciated that and thought it was the way to go.

## *Annual Meeting Summit*

### Projects and Concepts:

- Fiscal viability – State budget impact. Still provide services. Increase financial resources.
  - New money sources ~20% of budget. Need a Development officer to get the money. Increase awareness. Go to Corporations
  - Use L2 calendars. Facility usage. Other Resources
- Increase knowledge in the system. Conferences with local politicians. Go beyond just board members to trustees. Spread message.
- Ensure viability both MLS and members.
- Collaboration on funding sources. Collaboration of successful programs.

- Advocacy, marketing ourselves. We need to let people know how important we are.

#### Success Factors

- 20-30% new funds in MLS and new members. Endowment fund established. Employee working full time in new funding. Improve public relations. Getting word out. System wide list of materials and resources. MLS yellow pages (ELI). List skills that you are willing to share.

### **Harness Technology**

#### *Key Concepts from the MLS Board Planning Committee*

- Cultivate strategies for utilizing new technologies instead of being driven by them.
- Maintain focus on the impact of technology on the membership and society at large.

#### *Focus Group Feedback*

We are living in a technological age where change is occurring at a rapid pace. Members think MLS can reasonably respond to these changes by promoting environmentally friendly libraries and technology. MLS can share best practices.

“Technology is more than computers. It also involves space planning ideas.”

MLS should continue to offer CE workshops on Technology and expose members to what is available. More online learning.

“Lead public libraries to money sources to help them have technology. Enable collaboration among libraries to apply for funding (leverage large numbers of them).”

The best way for MLS to harness technology and use it to its best advantage to service the members, the community and its staff to keep them apprised of changes in technology and share nuances.

“As a small library we don't have the ability to evaluate the technology. Our patrons don't care about new technology. The patrons have an impact. As long as there is a computer they are happy.”

“Start technology for school libraries. What's new. What's hot. The technology should be geared to grades K-6.”

“Continue with the community of practice for libraries. Have various types of programs online for use at their desks. Web junction has more training for non-public libraries.”

“MLS needs to be on the leading edge. Find out what the trends are. Bring those trends, risks and opportunities to the members. Show them what is happening in the global world.”

#### *Annual Meeting Summit*

##### Projects and Concepts:

- MLS should become the place to go to for technology. The hub. Make it more important than Delivery. Have one technology contact.
- Pooling knowledge: Draw on members for Technology gurus. Network leverage.
- Assistance locally. Location should not be a barrier.
- Technology across libraries – big and small. Assessment of footprints and provide recommendations.
- Clearinghouse for decision making – shared on previous decision (of technology).
- Not just one way of doing things. Allow nuances.

- Training courses online. Taught by MLS. R&D – failure in pilots so can make recommendations. Learning even if don't end up using.

Success Factors:

- Conduct tech audit footprint. Hi touch, Hands on. MLS knows the expertise and can be updated by Members MLS Tech hub. All members feel tech empowered at all levels. 1<sup>st</sup> place to call.

## **Embrace External Influences**

Note: The original Initiative was Embrace Environmental Changes, which changed after the focus group feedback was received.

### *Key Concepts from the MLS Board Planning Committee*

- Increase system capacity to embrace future changes and trends.
- Educate membership on the risks and opportunities for libraries in the changing world.
- Provide leadership in watching and acting on new local, regional, and national developments.

### *Focus Group Feedback*

MLS can provide an invaluable service to its members in terms of helping respond to external changes by investing more in sustainable buildings, educating Trustees and the community.

“MLS should be a leader in this effort and also have the communities involved – ex. “I pledge to.....”

“MLS leadership should watch what is happening in the global world.”

“MLS should be the lead for group grants and group purchases – ex. downloadable audio books. LIMRiCC – insurance group is affordable and meets our needs. It benefits all members.”

“External influences’ is really the question. Environmental is not meant as environmental issue. It is more.”

“Getting the questions and the answers, we can make informed choices.”

### *Annual Meeting Summit*

Projects and Concepts:

- Identify trends proactively. Reduce adoption cycle.
- Clearinghouse – contribute by blogs, Identify trends.
- MLS role to reach out and hand hold to facilitate change.
- Take advantage of expertise.

Success Factors:

- Trend site; post the trends. Tech, culture, world events. Trends deployed before the business. Success and failures shared. Project success rates and include inquiry of past projects