

# **2015 MHLS Annual Member Survey Report**

The MHLS *Planning and Personnel Committee* conducts an annual survey of the member library Board Presidents and Directors. This report will address both the actions taken to address the 2014 survey results and the results of the 2015 survey. (The 2015 results and recommendations are on pages 3 & 4.)

## **Follow-up on 2014 Survey**

### 2014 Directors Survey

After the 2015 Directors Survey the MHLS staff focused on three areas for additional attention: *Construction Grant Program*, *Special Client Services* and *Cooperation with Other Library Systems*. These became the focus of the 2015 survey based on the proposed methodology for 2014 (and now 2015).

The *Construction Grant Program* received a very focused re-evaluation this year, including a separate survey and was therefore NOT included in the 2015 survey.

Based on survey comments and feedback from the Directors Association from the 2014 survey *Integrated Library System Services* was added to the 2015 survey.

### 2014 Board Presidents Survey

The only area requiring follow-up based on the results of the 2014 Board Presidents Survey was the *MHLS Board Outreach Efforts*. We, as a board, increased our contact with member library boards and county library associations and held two MHLS Board meetings in member library facilities.

## **2015 Survey**

For 2015 we retained the format and Plan-of-Service-focus of the 2014 survey, not surveying some areas as planned based on the 2014 results and asking additional questions in the remaining areas to try to determine specific sub-areas for additional remedial focus in 2016.

The raw survey results have already been distributed to the MHLS Board and to the Directors but are also available on request (as are the breakdowns by county).

## Participation

Without counting some duplicate submissions, we had a slight decrease in participation this year, 5-6% overall\*. The board thanks all participants for their time and effort! The following table shows the participation including the duplicates:

Year	Total Responses	Board Presidents	Directors
<b>2015</b>	<b>115 (87%) *</b>	54 (82%)	61 (92%)
<b>2014</b>	111 (84%)	47 (71%)	64 (97%)
<b>2013</b>	87 (66%)	39 (59%)	48 (73%)
<b>2012</b>	91 (69%)	34 (52%)	57 (86%)
<b>2011</b>	73 (55%)	29 (44%)	44 (67%)
<b>2009</b>	42 (32%)	7 (11%)	35 (53%)

\* It appears that ONE director and FIVE (possibly 6) Board Presidents submitted duplicate surveys. As in 2014, we proceeded using everything submitted after carefully reviewing the results to see if the duplicates would change any conclusions. They did not. By retaining the duplicates we did retain some comments that were meaningful.

## Methodology

To gain a more in-depth understanding of each of the three focus areas the **Directors Survey** was broken down into multiple (2-4) questions as shown below.

### Staff Input

The Staff Report (Appendix A) included the assumptions the staff used (and the committee agreed with) in their analysis of the results. The methodology was identical to that used for the 2014 survey. Each sub-area was rated based on the objective ranking of responses for the sub-area to aid the board and staff in focusing on areas that need attention or improvement as well as areas that are already successful and will not be recommended for survey questions in 2016. The rating criteria is on the first page of the Staff Report (Appendix).

This analysis was not necessary for the **Board Presidents Survey**.

### Directors Association Input

The results of both surveys have been provided to the MHLS Directors Association for their analysis. The results of any analysis they provide will be incorporated in a final draft and presented at a future MHLS Board meeting.

## **Directors Association & Systems Services Advisory Committee Comments**

The *Directors Association* and the *System Services Advisory Committee* final comments regarding the 2016 Library Directors' Survey are:

1. General Comments:
  - a. Include notice requesting comments focusing on services not individual MHLS staff members.
  - b. Conduct focus groups in 2016 rather than a written survey.
2. Youth Services
  - a. Review survey findings by county. Conduct a county based discussion with directors in each county with 10% or more respondents (Dutchess & Ulster) reporting Youth Services "Needs Improvement."
  - b. Explore if Youth Services rating is based on comparing current level of service to level of service prior to MHLS budget/service cuts.
3. III Software/Functions
  - a. Review opportunities for providing directors with information regarding III proposed enhancements and encouraging membership in III IUG.
  - b. Determine member staff III software training needs and provide training opportunities which include instruction by front line member staff.
  - c. Identify III procedures/functions not currently implemented by MHLS and determine if implementation of procedures/functions will improve service. Examples include Courtesy Notices, Spanish Language interface, and Remote User Registration.
  - d. Identify software/apps (not III) not currently implemented by MHLS and determine if implementation of procedures/functions will improve service. Examples include Events Calendar, Receipts Reporting Value of Items Loaned, and Messaging Patrons.

## **Library Directors Survey Results and Recommendations**

The survey focus areas, sub-areas and objective results (ratings) were as follows:

### **Special Client Services**

Coordinated Outreach

Needs Attention

Adult Literacy

Needs Attention

Correctional Services

Needs Attention

Youth Services

Needs Improvement

### **Cooperation with Other Library Systems**

Advocacy

Needs Attention

Regional Events

Needs Attention

### **Integrated Library System Services**

MHLS Staff Support

Successful

Innovative Services Software Functions

Needs Improvement

Internet Service Provider

Needs Improvement

Note: The detailed analysis is contained in the Appendix to this report.

Based on the 2015 survey results, *Integrated Library System Services* and *Special Client Services* will **require an action plan to improve service.**

It is noted that a Request for Proposal (RFP) has been issued in conjunction with BOCES and other regional organizations that would cover all 66 member libraries for broadband service. Efforts with Innovative are continually on-going. The staff plans to ask director's for further clarification on *Youth Services*, as this was an area specifically cut-back a few years ago.

In retrospect, the directors should not have been surveyed on either *Correctional Services* or *Cooperation with Other Library Systems* as these are generally not services provided TO member libraries. These should have been addressed in separate surveys of the correctional facilities and other systems. **It is the committee's intent to conduct such surveys in 2016.**

#### Summary:

1. The Committee reviewed the *Survey of Library Directors* and the *MHLS Staff Report on the Survey of Library Directors*.
2. The Committee accepted the assessment model presented as shown above
3. The MHLS staff agreed to provide the Board with recommendations on potential actions regarding the two (2) service sub-areas needing attention (black above) and to develop action plans for the three (3) sub-areas "needing improvement" (red above).
  - Consideration should be given to the recommendations from the Directors Association for two of the areas needing improvement.
4. The MHLS staff agreed to provide contact information for 2016 surveys of the correctional facilities and other library systems (blue above).
5. As for the 2014 survey, the committee recommends that the survey results be used to report on the MHLS Plan of Service in the annual report and that this report be sent to all participants and interested parties.
6. The committee also agreed that the 2014 & 2015 survey findings should influence what is included in the 2016 survey, continuing the methodology of 2014. Some changes may be desirable as a new 5-year Plan of Service is being submitted in 2016 and the next survey should be coordinated with that.
7. The committee will make a recommendation to the board regarding the use of "focus groups" instead of (or in addition to) a survey in 2016.

#### **Library Board Presidents Survey Results and Recommendations**

The only area requiring follow-up based on the results of the 2014 Board Presidents Survey was the *MHLS Board Outreach Efforts*. We asked if board members would attend an MHLS meeting if it were held in their area and 29% said "No". There were no comments indicating this was a problem area.

About half (49%) indicated a desire to have a board member at one of their upcoming board meetings. The list of these libraries has already been forwarded to MHLS Board members for their separate action.

Comments were solicited on "What information could MHLS provide that would be helpful to your board?" All of these appear to be routine matters that can be addressed by the staff. Twenty-six (26) libraries asked for varying support but only thirteen (13) identified themselves. This information has been provided to the staff for their attention.

Summary:

1. The Committee reviewed the *Survey of Library Board Presidents*.
2. The Trustees Committee should develop plans to reach out to the libraries requesting MHLS Board presence at a member library board meeting
3. The MHLS Staff agreed to take the board presidents indication of areas they felt they needed specific additional information or support under advisement.
4. As for the 2014 survey, the committee recommends that the survey results be used to report on the MHLS Plan of Service in the annual report and that this report be sent to all participants and interested parties.
5. The committee also agreed that the 2014 & 2015 survey findings should influence what is included in the 2016 survey, continuing the methodology of 2014. Some changes may be desirable as a new 5-year Plan of Service is being submitted in 2016 and the next survey should be coordinated with that.

The results of both surveys are a part of the December MHLS Board packet and will, as in the past, be sent to all survey participants along with a copy of this report. Results for individual counties are available on request.

The Board President and Director comments are included as Appendices B & C to this report.

Requests for aforementioned additional materials should be directed to [JohnBickford@Alumni.UVM.edu](mailto:JohnBickford@Alumni.UVM.edu) with a copy to [tsloan@midhudson.org](mailto:tsloan@midhudson.org).

## Appendix A: MHLS Staff Report – 2015 Directors Survey and Findings

### Working Assumptions - Purpose:

1. Board Bylaws state the objectives of the System shall be to foster and improve library service to the residents of the System area, through the member libraries, as specified in the System's Plan of Service.
2. Board Bylaws<sup>1</sup> state it is the Board's responsibility to "adopt a Plan of Service and amend it as necessary" and "insure the achievement of the System's objectives."
3. In support of the Board duties as described above, the Board conducted a survey of MHLS Library Directors regarding the Plan of Service, and a survey of MHLS Library Board Presidents regarding service interactions between trustees and MHLS staff.

### Working Assumptions - Surveys:

1. The MHLS Board recognized seven (7) services rated as Highly Successful or Successful based on the 2014 survey.
2. The 2015 survey focus more in depth on three (3) MHLS services which are rated in the 2014 survey as needing attention.

### Ranking MHLS Services Based on Survey Findings:

RATINGS	CALCULATION	ACTION
Highly Successful	More than 75% ranking as Significantly Exceeding or Exceeds Expectations	Service is not 2016 focus. No actions planned. Board surveys in 2017, not 2016.
Successful	More than 90% ranking as Significantly Exceeding, Exceeds, or Meets Expectations,	Service is not 2016 focus. Board surveys in 2016.
Needs Attention	More than 10% ranking Below Expectation, Requires Improvement, and/or No Opinion	Service area is 2016 focus. Specific actions are taken to bring attention to the service. Board surveys again in 2016.
Needs Improvement	More than 10% ranking Below Expectation and/or Requires Improvement	Service area is 2016 focus. Action plan is developed to improve service. Board surveys again in 2016.

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<sup>1</sup> MHLS Board Bylaws - The Board of Trustees, hereinafter referred to as the Board, is entrusted with the governance of the System. It shall adopt Bylaws, adopt a Plan of Service and amend it as necessary, establish such policies as will insure the achievement of the System's objectives, employ a Director, and employ and appoint other staff upon the recommendation of the Director and as the Board deems necessary, supervise the expenditure of the System's funds, discharge all such responsibilities as provided for in these Bylaws and exercise such other responsibilities as may be appropriate

The chart below uses the above model to organize the services and survey responses:

<b>SERVICES</b>	<b>% Significantly Exceeds or Exceeds Expectations</b>	<b>% Meets Expectation</b>	<b>% Below Expectation or Needs Improvement</b>	<b>No Opinion</b>	<b>Rating</b>
<b>SPECIAL CLIENT SERVICES</b>					
Special Client Services – Coordinated Outreach	43.62%	39.34%	3.28%	14.75%	Needs Attention
Special Client Services – Adult Literacy	34.43%	45.90%	6.56%	13.11%	Needs Attention
Special Client Services – Correctional Facilities	21.31%	29.51%	1.64%	47.54%	Needs Attention
Special Client Services – Youth Services	22.92%	45.90%	18.03%	13.11%	Needs Improvement
<b>COOPERATIONS WITH OTHER LIBRARY SYSTEMS</b>					
Cooperation with Other Library Systems – Advocacy	59.02%	29.51%	1.64%	9.84%	Needs Attention
Cooperation with Other Library Systems – Regional Events	44.27%	34.43%	1.64%	19.67%	Needs Attention
<b>INTEGRATED LIBRARY SYSTEM SERVICES</b>					
MHLS Staff Support for Innovative Interfaces (III)	63.94%	29.51%	6.56%	0.00%	Successful
Innovative Interfaces (III) – Software/Functions	8.20%	60.66%	31.15%	0.00%	Needs Improvement
Internet Service Provider (ISP) Services	9.84%	45.90%	36.07%	8.20%	Needs Improvement

#### Survey Findings 2015:

1. MHLS staff should report to the MHLS Board on the three (3) services rated as Needs Improvement.
2. In 2016, the MHLS Board, Directors Association, and MHLS Staff will be engaged in developing the MHLS 2016-2021 Library System Five-Year Plan of Service, which will include the ranking of MHLS services based on the Moving Forward Assessment of Services. Any 2016 survey of Library Directors should be in support of the 2016-2021 Library System Five-Year Plan of Service.

## Appendix B: Board President Comments

<b>County</b>	<b>Library</b>	<b><i>What information could MHLS provide you that would be helpful to your Board?</i></b>
Dutchess	Amenia	Capital Campaign Ideas Dealing with the possible retirement of a long time Library Director
Greene	Catskill	What additional programs would be of interest to our public and the best way to promot them.
Columbia	Claverack	how to make Library more vibrant and active in the community
Dutchess	Howland	Friends groups, recruiting and educating board members, fiscal responsibilities of the board, public meeting law, running effective board and subcommittee meetings, community outreach, staff and patron engagement
Putnam	Kent	Suggestions for assisting our Friends group. Clarification on Civil Service issues. Diverse lending options - not just books!
Columbia	Kinderhook	Best practices as determined by MHLS staff
Putnam	Mahopac	Auditing/Financial issue information, Policy Issue information
Ulster	Morton	Additional, personalized information about applying for grants applicable to small, rural libraries.
Putnam	Patterson	How to interpret the tax cap and how it effects our 414 efforts. Ways to raise funds for expansion and help in planning what an expansion might include.
Ulster	Phoenicia	We are planning to put a proposition on the ballot next year for a raise in our town budget (414). We may need some help with PR strategy .
Ulster	Plattekill	More varied topic focus of Essential Training and Advanced Training. More sessions of each annually. How to deal with negativity on our Board.
Dutchess	Red Hook	We would like to be regularly updated on the MHLS budget situation and how that will impact individual libraries in the system.
Columbia	Roe Jan	We are currently getting the info. we need. Thank you.
Columbia		Currently strat. planning -- getting support/help from MHLS. Will ID future needs. (SUBMITTED BY MAIL.)
Dutchess		building expansions
Dutchess		Capital fundraising efforts and 414 campaign suggestions.
Dutchess		Future of libraries
Dutchess		How to get money for a capital project we are planning.



Dutchess	<p>Information regarding assessing community opinions regarding the library, and preparing for fundraising for a major renovation.</p> <p>Our director does an excellent job of communicating with us; however, our Board would like more direct information regarding fees charged by Mid-Hudson and how those fees are determined. The MHLS website is a great source of information and we have always found staff to be helpful, particularly Rebekkah Smith-Aldrich but there is a lot expected of Trustees - if there could be quarterly updates/workshops or on-line webinars with new information regarding laws, etc., that would be helpful.</p> <p>Samples of library position descriptions</p> <p>Any information would be helpful.</p> <p>Anyone is welcome to join us at our Board meetings.</p>
Dutchess Greene Greene	<p>Right now we are dealing with IT issues and are getting help from MHLS. We have a new Director and have been asking lots of questions. Help is always needed and MHLS has been very helpful. Building community connections is always something I would think all libraries could use help with.</p>
Ulster	<p>Info on Board development- community involvement- and how best to be an advocate for our specific library</p>
Ulster	<p>We find Directors we've had lacking in both managerial/human resource and organizational skills. If we are having similar issues with our last four Directors then others must be having like issues as well.</p>

## Appendix C: Library Director Comments

<i>County</i>	<i>Library</i>	<i>Open Comments</i>
Columbia		<b>These answers should be coordinated with rating for which services are most important, and then a gap analysis should be made.</b>
Dutchess		Executive Director Tom Sloan has done an incredible job in his tenure thus far. He's intelligent, fair, reasonable and always manages to shine the spotlight on those around him rather than taking credit. He is also first to step up if problems arise. His handling of the Town of Ulster-situation shows how truly adept he is, managing to always stay professional and provide the facts, when others may get rather ugly.
Dutchess		I congratulate the Board on choosing to use an employment service in the hiring of Tom Sloan. Mr. Sloan has shown real leadership as a team-player with his staff and a cooperative partner with the member libraries.
Dutchess		I really feel that mhls needs to start giving member fees back, rather than spend on incentives or beef up fund balances when so many libraries don't have such a luxury.
Dutchess	Heermance	Merribeth, Rebekkah, Robert and Tom Finnigan all do an exceptional job managing their unique departments and services MHLS staff is always helpful and we could not offer our patrons the services we do if we were not a part of the system. I was disappointed when Merribeth Advocate did not make the final cut for director, but Tom Sloan has done a very good job of bringing everyone together and recognizing the contributions of all the MHLS staff.
Dutchess		MHLS folks are above and beyond in their helpfulness, resources added and made available to member libraries. Most of all it's the staff there that make our system what it is today.
Dutchess		The MHLS staff are extremely helpful!
Putnam		<b>I'm not clear if this survey is instead of or in addition to surveying the Director of MHLS.</b>
Response		Cataloging discrepancies in the OPAC need review, work & consistency.

Ulster I feel that all grants, mileage reimbursement or otherwise, that are fund with fees collected from member libraries should be stopped. I am offended that my patrons tax dollars are being used to fund projects that do not equally help every library in the system. How can I ask my community for more funding, when I know that it will be partially used to fund programs that have no benefit to them.

Ulster The MHLS staff is excellent and deserves all the support and reward that we can afford them.

Ulster Kingston The staff at MHLS are fantastic. They are smart, hard working and care a great deal about the success of member libraries. That shows in the level of support they provide to us. Even in the face of serious budgetary issues they have continued to go above and beyond for member libraries. I never hesitate to turn to MHLS staff for assistance with anything--even when I know I'm asking the same dumb question they've heard 20 times. They're great!

Ulster Stone Ridge The tech people do a good job but they are hampered by what they have to work with.

Ulster **This is an irrelevant survey.**

Ulster Phoenixia You are overseeing certainly one of the best systems staffs in the nation. The only area for improvement is securing better funding so staff can continue to provide services. I am sure that is very hard. Phoenixia Library is an example of a library that has for the last decade relied heavily on the staff at MHLS because of challenges it encountered. At every challenge we turned and turn to MHLS, and because of the expertise and support we received, were able to do amazing things for our community. MHLS has made the difference at every key juncture and continues to do so. From capital campaign and 414 support, to our current strategic planning with focus groups and survey, MHLS has helped me and my board lead the library to a far better place for the community. Thank you.

Ulster **Your survey doesn't mention some of the things which are most important to us - such as the delivery system, co-ordination of Overdrive and other databases, giving advice on public votes, offering continuing education opportunities, etc.**