

## MID-HUDSON LIBRARY SYSTEM PLAN OF SERVICE 2017-2021 | REPORT ON MHLS ACTION PLAN

- ACTIONS COMPLETED INDICATED WITH ~~STRIKETHROUGH~~
- 2020 ACTIONS INDICATED WITH **YELLOW HIGHLIGHT**
- 2019 ACTION ADDED IN Q4 OF 2019 INDICATED WITH **AQUA HIGHLIGHT**

## CONTENTS

Service Priority 1 - Delivery: .....	2
Service Priorities 2 & 3 - Integrated Library System & Cataloging Services: .....	4
Service Priorities 4 - Coordinated Services (IT) for Members .....	7
Service Priorities 5 - Professional Development and Training .....	9
Service Priorities 6 - Consulting and Development Services.....	12
Service Priorities 7 - Cooperative Collection Development .....	15
Service Priorities 8 - Digital Collection Access.....	17
Service Priorities 9 - Awareness and Advocacy .....	19
Service Priorities 10 - Interlibrary Loan (ILL) .....	22
Service Priorities 11 - Construction .....	23
Service Priorities 12 - Communications Among Member Libraries .....	25
Service Priorities 13 - Coordinated Outreach: .....	26
Service Priorities 14 - Youth Services .....	27
Service Priorities 15 - Early Literacy.....	29
Service Priorities 16 - Adult Literacy.....	30
Service Priorities 17 - Cooperative Efforts with Other Library Systems .....	31
Service Priorities 18 - Correctional Facilities .....	32

**SERVICE PRIORITY 1 - DELIVERY:**

1. Goal Statement: MHLS will coordinate physical delivery service to all member libraries and partner institutions, including providing material sorting services and contracting with a commercial vendor for material delivery services.
2. Intended Result(s):
  - a. Member libraries will efficiently share library materials.
  - b. Library materials will be collected and distributed by the most cost-effective method through continuous refinement of the means to expedite delivery.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from member library directors and staff.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors resulting in the evaluation and rating of this service.
  - d. Periodic review by MHLS System Services Advisory Committee of this service.
  - e. Ongoing review by MHLS staff of delivery usage patterns, statistics, outputs, and capacity.
4. Action Plan – Continuing Services: Ongoing delivery services are reported in the Moving Forward Assessment Report at:  
<http://midhudson.org/wp-content/uploads/2015/03/Delivery-Services-Assessment-Summary.pdf>
5. Action Plan – New Activities:

<del>A. Member libraries will efficiently share library materials.</del>					
	2017	2018	2019	2020	2021
<del>Assess MHLS current and future needs for a MHLS vehicle and develop vehicle use plan.</del>	✕				
<del>Facilitate review of and decision regarding MHLS vehicle use plan.</del>		✕			
<del>Implement vehicle use plans.</del>			✕	✕	✕

B. Library materials will be collected and distributed by the most cost-effective method through continuous refinement of the means to expedite delivery.					
	2017	2018	2019	2020	2021
<del>Identify Delivery Services options and costs via a Request for Proposal (RFP).</del>			✕		
<del>Decision regarding Delivery Services starting in July 2019.</del>			✕		



# MID-HUDSON LIBRARY SYSTEM MEMORANDUM

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<del>Contract for and implement Delivery Services.</del>			X		
Coordinate Delivery Services as contracted.				X	X

**SERVICE PRIORITIES 2 & 3 - INTEGRATED LIBRARY SYSTEM & CATALOGING SERVICES:**

1. Goal Statement: MHLS will coordinate Integrated Library System (ILS) services for all member libraries.
2. Intended Result(s):
  - a. Member library directors and staff will have access to an ILS which allows effective and efficient:
    - 1) management of library acquisitions and inventory;
    - 2) management of patron information; and
    - 3) searching, circulation, and sharing of library materials.
  - b. Member library directors and staff will have access to accurate and reliable bibliographic information and records.
  - c. Member library directors and staff will be knowledgeable, skilled, and cooperative in operating the ILS through training, documentation, and communications.
  - d. Member library directors will receive periodic reports regarding the state of ILS services and recommendations for improvement.
  - e. MHLS member library directors will have access to on-site/in-person workflow consulting on ILS services.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from ILS users.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors resulting in the evaluation and rating of this service.
  - d. Periodic review by MHLS Resource Sharing Advisory Committee of this service.
  - e. Report to and confer with the Directors Association and the MHLS Board of Trustees on actions, outputs and trends that affect this service.
  - f. Ongoing review by MHLS staff of ILS usage patterns, statistics, outputs, and capacity.
4. Action Plan – Continuing Services: Ongoing Integrated Library System & Cataloging Services are reported in the Moving Forward Assessment Report at:  
<http://midhudson.org/wp-content/uploads/2015/03/Integrated-Library-System-Services-Assessment-Summary.pdf>  
<http://midhudson.org/wp-content/uploads/2015/03/Cataloging-Services-Assessment-Summary.pdf>
5. Action Plan – New Activities:

A. Member library directors and staff will have access to an ILS which allows effective and efficient: management of library acquisitions and inventory; management of patron information; and searching, circulation, and sharing of library materials.					
	2017	2018	2019	2020	2021

Identify and study the latest developments in library services platforms (LSPs) components that make up the library technology 'ecosystem', recognizing multiple source components may be desired in place of or in addition to a closed and monolithic suite of ILS services from a single vendor.	✕				
Write, distribute and discuss with stakeholders an LSP white paper, which will guide and informs stakeholders about LSP issues and presents options on how best to proceed.		✕			
Facilitate stakeholders' review of and decision(s) regarding LSP selection(s) for LSP services starting in 2019.			✕		
Contract for and implement LSP services as selected by stakeholders.			✕		
Development and implementation of an ILS Road Map			✕	X	X
Coordinate LSP services as contracted.				X	X
Assess ILS and workflows in outside audit. Address recommendations and follow through on process retraining.			✕	X	

<p>B. Member library directors and staff will be knowledgeable, skilled, and cooperative in operating the ILS through training, documentation, and communications.</p> <p>C. MHLS member library directors will have access to on-site/in-person workflow consulting<sup>1</sup> on ILS services.</p>					
	2017	2018	2019	2020	2021
Provide monthly Circulation Essential Webinars	✕	✕	✕	X	X
Offer in-person workflow consulting in the areas of: Patron Entry, Reports, Create List Fundamentals, Create Lists for Data Cleanup, Circulation Basics for New Employees, Notices & Templates	✕	✕	✕	X	X

<sup>1</sup> Based on the request of a library director, MHLS staff will examine library staff workflow in using the ILS and will report to the library director on opportunities for improvement and changes that will increase efficiency

Develop and implement a Sierra Users Group program that meets twice per year			✕	X	X
Core Competency Training for member library staff in the areas of circulation and cataloging to be offered regionally			✕	X	X

D. Member library directors will receive periodic reports regarding the state of ILS services and recommendations for improvement.					
	2017	2018	2019	2020	2021
Automate ILS reports performed by using SQL <sup>2</sup> to facilitate transfer to member libraries	✕	✕	✕	X	X
Member library accessible portal will be provided to allow on demand or automatic generation of complex ILS statistics Create New Knowledge Base website, include access to E resource statistical data		✕	✕	X	X
<del>Automate Annual ILS report data</del>			✕		

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<sup>2</sup> **Structured Query Language (SQL)** is a standard computer language for relational database management and data manipulation. **SQL** is used to query, insert, update and modify data.

#### **SERVICE PRIORITIES 4 - COORDINATED SERVICES (IT) FOR MEMBERS**

1. Goal Statement: MHLS will provide member libraries with cost-sharing and group purchasing opportunities for Information Technology (IT) products, services, and consulting.
2. Intended Result(s):
  - a. Member libraries will have opportunities to:
    - Purchase appropriate and reasonably priced IT products and services
    - Receive effective and efficient IT services
  - b. MHLS member libraries will have access to consulting and development services in the areas of e-rate; facilities planning for IT services; IT management, and network/broadband.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from users of Coordinated Services.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors resulting in the evaluation and rating of this service.
  - d. Report to and confer with the Directors Association and the MHLS Board of Trustees on actions, outputs and trends that affect this service.
  - e. Ongoing review by MHLS staff of IT product and service usage patterns, statistics, outputs, and capacity
4. Action Plan – Continuing Services: Ongoing Coordinated (IT) Services are reported in the Moving Forward Assessment Report at:  
<http://midhudson.org/wp-content/uploads/2015/03/Coordinated-Services.pdf>
5. Action Plan – New Activities:

A. Member libraries will have opportunities to:					
➤ Purchase appropriate and reasonably priced IT products and services					
➤ Receive effective and efficient IT services					
	2017	2018	2019	2020	2021
<del>Aerohive Routers will be purchased and configured on behalf of member libraries</del>	✕	✕			
<del>Facilitate stakeholders' review of the Aerohive Routers project</del>		✕			
Offer configuration, statistics, and tech support for Aerohive Routers	✕	✕	X	X	X

B. MHLS member libraries will have access to consulting and development services in the areas of e-rate; facilities planning for IT services; IT management, and network/broadband.					
	2017	2018	2019	2020	2021

Evaluate cloud management centralization technologies to support member library PCs, software, and networks	✕				
Offer fee-based cloud management centralization technologies to support member library PCs, software, and networks		✕	✕	✕	✕
Support transition for SAM libraries without command PCs to alternatives	✕	✕			

C. MHLS member libraries will have access to consulting and development services in the areas of e-rate; facilities planning for IT services; IT management, and network/broadband.					
	2017	2018	2019	2020	2021
Phase I: E-Rate planning and project preparation with identified partners for community connectivity demonstration projects	✕				
Support for implementation and operations of community connectivity demonstration projects		✕	✕	X	X



### **SERVICE PRIORITIES 5 - PROFESSIONAL DEVELOPMENT AND TRAINING<sup>3</sup>**

1. Goal Statement: MHLS will coordinate professional development and training focused on select subjects for the library directors, staff, trustees, and Friends of member libraries.
2. Intended Result(s): Member library directors, staff, trustees, and Friends will have access to professional development and training which:
  - a. Improves the skills and knowledge necessary to fulfill their roles and responsibilities;
  - b. Focuses on proactively meeting the current and future challenges of the community; and/or
  - c. Addresses the following tracks: leadership (2019); operational management (2019); trustee education (2017-2021); community engagement and sustainable funding (2018); library user experience (2020).
3. Evaluation method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from member library directors, staff, trustees, and Friends, and evaluations by attendees at each professional development and training event.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors and board president resulting in the evaluation and rating of this service.
  - d. Report to and confer with the Directors Association and the MHLS Board of Trustees on actions, outputs and trends that affect this service.
  - e. Ongoing engagement with member library directors, staff, trustees, and Friends to determine professional development and training needs.
  - f. Follow-up surveys for selected events asking participants if the session resulted in changes in behavior, skills, knowledge.
4. Action Plan – Continuing Services: Ongoing Professional Development/Continuing Education Services are reported in the Moving Forward Assessment Report at: <http://midhudson.org/wp-content/uploads/2015/03/Professional-Development-and-Continuing-Education-Assessment-Summary.pdf>
5. Action Plan – New Activities:

A. Trustee Education Program					
	2017	2018	2019	2020	2021
Redesign and offer Orientation for New Trustees workshop using the Helping All Trustees Succeed (HATS) curriculum	✖	✖	✖	X	X
Design and offer Intermediate Trustee workshops,	✖	✖	✖	X	X

<sup>3</sup> Programs initiated and sponsored by the system, including on-line professional development that the system has facilitated or offered

using the Helping All Trustees Succeed (HATS) curriculum. Financial & Fiduciary (2017, 2018, 2019, 2020, 2021) and Legal Issues (2019, 2020)					
Design and offer Advanced Trustee workshops using the Helping All Trustees Succeed (HATS) curriculum. Strategic Thinking: Planning & Advocacy (Community Engagement 2018, 2019) and Seven Habits of Highly Effective Boards (Leadership 2020, 2021)		✖	✖	X	X
Identify, plan, and offer online "mini-events" (e.g., partnership with HATS/State Library)	✖	✖		X	X

B. Operational Management & Leadership Development Program for Library Directors & Staff					
	2017	2018	2019	2020	2021
Survey member library directors, plan, and offer training on financial & fiduciary topics	✖		✖		X
Survey member library directors, plan, and offer training on legal topics		✖	✖	X	
Survey member library directors and recruit member library directors and staff regarding participation in a regional Leadership/Operational Management Program (e.g., LIU/Palmer School Advanced Certificate in Public Library Administration program; (Emerging) Leadership Academy; NYLA Leadership & Management Academy)				X	
Offer Leadership/Management Program					X

C. Community Engagement/Project Outcome Program for Library Directors & Staff					
	2017	2018	2019	2020	2021
<del>Plan Project Outcome</del> <sup>4</sup> Program	✖				

<sup>4</sup> "Project Outcome [<http://www.projectoutcome.org/>] is a FREE toolkit designed to help public libraries understand and share the true impact of essential library services and programs by providing simple surveys and an easy-to-use process for measuring and analyzing outcomes. Project Outcome also provides libraries with the resources and training support needed to apply their results and confidently advocate for their library's future."

Host Project Outcome training		✕			
Assist county associations and mandated grant recipient member libraries utilizing Project Outcome		✕	✕	X	
Plan and conduct an event to convey results of libraries using the Project Outcome process/product					X
Produce Engage Webinar Series and plan workshops for directors/staff to elevate best practices related to community engagement			✕	X	X
Develop and offer an "Advocates & Ambassadors" workshop regionally for library staff, trustees and Friends			✕	X	X

D. Library User Experience Best Practices					
	2017	2018	2019	2020	2021
Convene directors who have participated in MHLS Incubator and Lab Projects to identify best practices for improving library user experiences both in a library's facility and on a library web site				X	
Develop and provide tools to aid member libraries in improving the user experience both in their libraries and online					X

E. Task Force Groups					
	2017	2018	2019	2020	2021
Convene, as needed, task force groups on professional development and training needs.	✕	✕	✕	X	X
<del>Discontinue MHLS Continuing Education/Professional Development Advisory Committee</del>	✕	✕	✕	✕	✕

### **SERVICE PRIORITIES 6 - CONSULTING AND DEVELOPMENT SERVICES<sup>5</sup>**

1. Goal Statement: MHLS will provide expertise to member library directors and member library boards and their local communities in the areas of library management<sup>6</sup>, library governance<sup>7</sup>, community-based planning<sup>8</sup>, community engagement<sup>9</sup>, and sustainable funding<sup>10</sup>.
2. Intended Result(s):
  - a. MHLS member libraries will optimize:
    - Effective management practice
    - Transparent and accountable governance practices
    - Best practices for community-based planning
    - Viable funding strategies and tactics
    - Sustainable Thinking<sup>11</sup> practices
  - b. MHLS member library directors and member library boards will have access to on-site/in-person consulting and development services.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on member library directors and member library board comments.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors and board president resulting in the evaluation and rating of this service.
  - d. Report to and confer with the Directors Association and the MHLS Board of Trustees on actions, outputs and trends that affect library development.
4. Action Plan – Continuing Services: Ongoing Consulting/Development Services are reported in the Moving Forward Assessment Report at: <http://midhudson.org/wp-content/uploads/2015/03/Consulting-and-Development-Services.pdf>

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<sup>5</sup> Programs or services that provide expertise to member libraries and branches and local communities in areas such as program content, grant writing, library governance, operation and sustainability, budgets, grants administration, legal issues, facility planning and technology

<sup>6</sup> For example: Director Coaching; Human Resources; Facilities

<sup>7</sup> For example: Library Charters and Registration; Policies; Board Procedures

<sup>8</sup> For example: Community Focus Groups; Surveys; Board Process for Planning

<sup>9</sup> For example: Community Scans/Assessment; Community Leader Interviews; Participatory Program and Service Planning

<sup>10</sup> For example: Financial Planning; Public Votes; Friends Groups

<sup>11</sup> Sustainable Thinking Definition: *Sustainable thinking aligns a library's core values and resources with the local and global community's right to endure, to bounce back from disruption, and to thrive by bringing new and energetic life to fruition through choices made in all areas of library operations and outreach.*

[https://www.nyla.org/max/userfiles/Documents/NYLA\\_Sustainability\\_Initiative\\_White\\_Paper\\_10.12.15.pdf](https://www.nyla.org/max/userfiles/Documents/NYLA_Sustainability_Initiative_White_Paper_10.12.15.pdf)

5. Action Plan – New Activities:

A. Community Based Planning Project					
	2017	2018	2019	2020	2021
<del>Create trend data and demographic reports for boards embarking on long range plan (LRP) process</del>	✕				
Develop pilot program of libraries that will use the Ask Exercise and Community Conversation workbook from the ALA Libraries Transforming Communities Project as part of their planning process	✕	✕	✕	X	X
Event to convey result of cohort experience				X	
Development of LRP workbook for boards/directors					X
Workshop for directors to learn how to lead their library through a planning process					X

  

B. Library Management: Change Management Model Demonstration Project					
	2017	2018	2019	2020	2021
<del>Identify partner libraries</del>	✕				
Pilot Change Management Model program with a member library		✕			

  

C. Community Engagement Laboratory Projects <sup>12</sup>					
	2017	2018	2019	2020	2021
<del>Increasing Civic Engagement<sup>13</sup></del>	✕				
<del>Increasing Activation and Retention of Cardholders (2018-2019)</del>		✕	✕		
<del>Increasing Program Attendance (2019)</del>			✕		
Increasing YES Votes (2020)				X	

<sup>12</sup> Modeled on the MHLS Increasing Circulation Incubator

<sup>13</sup> E.g., Voter Registration Demonstration Project

Mini-Conference on Community Engagement Best Practices Identified Through Lab Projects					X
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D. New Director Orientation & Support					
	2017	2018	2019	2020	2021
Re-design orientation process	X	X	X	X	
Publish new edition of the Handbook for New Public Library directors				X	

E. Sustainable Thinking in Practice					
	2017	2018	2019	2020	2021
Orientation for MHLS Board & Staff to Sustainable Thinking	X				
MHLS pursuit of certification through the NYLA Sustainable Library Certification Program		X	X	X	
Create and support cohort of member libraries seeking NYLA Sustainable Library Certification Program		X	X	X	X
Plan and conduct a mini-conference on Sustainable Thinking for Member Library Directors, Staff, and Trustees				X	
Plan and conduct events (e.g., NYLA Annual Conference; Annual Membership Meeting) to convey results of MHLS/cohort experience				X	X

F. Technical Assistance Related to the New Minimum Standards for Public Libraries					
	2017	2018	2019	2020	2021
Assess new standards and how MHLS can best support members to come into compliance with the new standards in 2021				X	
Awareness-raising and provision of related support				X	X

### **SERVICE PRIORITIES 7 - COOPERATIVE COLLECTION DEVELOPMENT**

1. Goal Statement: MHLS will facilitate decision making on managing library physical collections and coordinate select shared collections<sup>14</sup>.
2. Intended Result(s):
  - a. Member library directors will have statistics and trend information to develop collections.
  - b. Member libraries and their patrons will have access to select shared collections.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from member library directors.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback<sup>i</sup> from member library directors resulting in the evaluation and rating of this service.
  - d. Periodic review by MHLS Central Library/Collection Development Advisory Committee of this service.
  - e. Report<sup>ii</sup> to and confer<sup>iii</sup> with the Directors Association and the MHLS Board of Trustees on actions<sup>iv</sup>, outputs and trends that affect collections designed to meet the needs of their community.
4. Moving Forward Assessment Report: <http://midhudson.org/wp-content/uploads/2015/03/Cooperative-Collection-Development-Services-Assessment-Summary.pdf>
5. Action Plan – New Activities:

A. Collection/Circulation Statistics					
	2017	2018	2019	2020	2021
MHLS compiles and distributes annual trend report of total circulation for MHLS member libraries	✕	✕	✕	X	X
<del>MHLS compiles and distributes annual trend report of checkout by annual report codes plus OverDrive statistics for MHLS member libraries</del>	✕	✕			
Central Library/PPLD compiles and distributes to each MHLS member library a list of items that have been in the library's collection for more than a given number of years and that have not circulated in a given number of years.	✕	✕	✕	X	X
Install Decision Center with Collection Development. Decision Center Implementation and training scheduled for Q1 2020. Assess				X	

<sup>14</sup> For example: Book Club in a Bag, Big Books

necessity of Central Library reports noted in line above.					
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B. Book Club in a Bag					
	2017	2018	2019	2020	2021
<del>Assess use, cost, and value of Book Club in a Bag service including the use of MHLS Book Club Request Form-</del>	X				
<del>Review with the SSAC assessment findings and determine how best to transition the collection to member libraries. (November 2017)</del>	X				
<del>Implement transition of the Book Club in a Bag collection to member libraries.</del>	X	X			

C. Big Books					
	2017	2018	2019	2020	2021
<del>Discontinue MHLS Big Book collection, offering the 88 books in the collection to member libraries.</del>	X				



### **SERVICE PRIORITIES 8 -DIGITAL COLLECTION ACCESS<sup>15</sup>**

1. Goal Statement: MHLS will facilitate access to shared digital collections provided to all member libraries.
2. Intended Result(s):
  - a. Member libraries will have access to shared digital collections<sup>16</sup> through websites and catalog enhancements.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from member library directors.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors resulting in the evaluation and rating of this service.
  - d. Periodic review by MHLS Central Library/Collection Development Advisory Committee of this service.
  - e. Report to and confer with the Directors Association and the MHLS Board of Trustees on actions, outputs and trends that affect digital collections provided to all member libraries.

<b>a. <u>Database Statistics</u></b>					
	2017	2018	2019	2020	2021
<del>Review and report on WAM statistics regarding accurate measure of patron use by library</del>	✕				
<del>Based on report findings, determine best method(s) to accurately measure patron use by library</del>		✕			

<b>b. <u>Unifying Access to E-Resources</u></b>					
	2017	2018	2019	2020	2021
Implementation and support of online registration for member libraries			✕	X	X
Conduct a survey of member e-Resources. Add eResources to the Sierra database for display in Encore.			✕		

<sup>15</sup> Explain how system-purchased and system-created collections are accessed by or shared with member libraries (i.e. via a website, search engine, database, etc.)

<sup>16</sup> For example: Encore search engine, databases, OverDrive E-Books & E-Audiobooks

Review remote registration of patron for the use of E-Resources	X				
Explore if and how to use geolocation <sup>17</sup> authentication of the databases rather than library card authentication.	X	X			
Review single sign on functionality to authenticate patrons for all MHLS shared E-Resources	X	X			
Review consolidated search options (e.g., universal knowledge base)		X			
Consider findings regarding single sign on functionality & consolidated search options in decision about contracting for library services platform			X		

<b>a. <u>Catalog Enhancements</u></b>					
	2017	2018	2019	2020	2021
Review and report on catalog enhancement products currently used.		X			
Compare currently used catalog enhancement products with products available in the marketplace.		X			
Incorporate catalog enhancement project findings in the decisions regarding Library Platform Services contact(s) signed in 2019		X	X		
Develop and Implement a Catalog Development Road Map				X	X
Develop and implement access to individual member resources within Encore. Access to library websites, registration and eResources will be included in a toolbar.			X	X	

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<sup>17</sup> Geolocation authentication is a method to allow or disallow a user based the identification or estimation of the real-world geographic location of an object, such as a mobile phone, or Internet-connected computer terminal.

### **SERVICE PRIORITIES 9 – AWARENESS AND ADVOCACY<sup>18</sup>**

1. Goal Statement: MHLS will provide professional development and training programs and organized networking for directors, staff, trustees, and Friends of member libraries; convene task force groups<sup>19</sup> on awareness and advocacy topics; and coordinate public awareness campaigns to support community engagement and sustainable funding.
2. Intended Result(s):
  - a. Member libraries will benefit from directors, staff, trustees, and Friends who:
    - Have strategies and tactics to be effective advocates
    - Are knowledgeable about:
      - Current federal, state and local legislative issues that impact sustainable funding
      - How member libraries and MHLS collaborate to achieve sustainable funding
    - Are developing and strengthening local, regional, and state library services through engagement with the New York Library Association (NYLA)
  - b. Member libraries will benefit from increased public awareness of the value and benefits of libraries and library services through public awareness campaigns coordinated by MHLS<sup>20</sup> or through MHLS member library projects<sup>21</sup>.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on directors, staff, trustees, and Friends of member libraries comments.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of Awareness and Advocacy efforts.
  - c. Periodic feedback from member library directors and board presidents resulting in the evaluation and rating of Awareness and Advocacy efforts.
  - d. Report to and confer with the Directors Association and the MHLS Board of Trustees on actions, outputs and trends that affect Awareness and Advocacy efforts.
4. Action Plan – Continuing Services: Ongoing Awareness/Advocacy Services are reported in the Moving Forward Assessment Report at: <http://midhudson.org/wp-content/uploads/2015/03/Awareness-Advocacy.pdf>
5. Action Plan – New Activities:

A. Annual DA PR Showcase & Spotlight					
	2017	2018	2019	2020	2021
Display and discussion at a DA meeting for member libraries to showcase their best flyers,	✕	✕	✕	X	X

<sup>18</sup> Includes system networking and programs which help member libraries increase public awareness of the value and benefits of libraries and library services

<sup>19</sup> For example: County Funding Advocacy Support Group

<sup>20</sup> For example: Hudson Valley Magazine article, Real People. Real Dollars.

<sup>21</sup> For example: NY Summer Reading Program

social media posts, outreach efforts, etc.					
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B. Public Awareness Campaigns for Shared eResources					
	2017	2018	2019	2020	2021
<del>Explore creation of an online library card-registration process</del>	✕	✕			
<del>Explore development and design of one stop-access to system-wide shared eResources</del>	✕	✕			
<del>Plan and implement public awareness campaign for E-Resources<sup>22</sup> (e.g., Consumer Reports, OverDrive eBooks/eAudiobooks, Zinio, Mango)</del>	✕	✕	✕		
<del>Assess with the Central Library/Collection Development Committee any changes in patron-use due to campaigns for E-Resources and if and how to proceed with additional campaigns for E-Resources targeting registered library patrons</del>	✕	✕	✕		

C. Increased Participation with the New York Library Association					
	2017	2018	2019	2020	2021
<del>Convene an ad hoc committee of MHLS-stakeholders to consider how to support their participation in NYLA</del>		✕			
<del>Provide committee recommendations to the MHLS Board</del>		✕			
Implement recommendations approved by the MHLS Board			✕	✕	X

D. Building Our Base of Support Outside of the Traditional Library Community					
	2017	2018	2019	2020	2021
Develop relationships and/or partnerships with like-minded stakeholders in the Hudson Valley not currently broadly affiliated with libraries	✕	✕	✕	X	X

<sup>22</sup> Implementation of campaigns dependent on the availability of additional funding

Re-design legislator outreach strategy			✕	X	X
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E. Task Force Groups					
	2017	2018	2019	2020	2021
Convene, as needed, task force groups on awareness and advocacy topics	✕	✕	✕	X	X
<del>Discontinue MHLS Marketing Advisory Committee</del>	✕	✕	✕	✕	✕

F. 2020 Census Focus					
	2017	2018	2019	2020	2021
Assist and advocate for the role of libraries in promoting and supporting the 2020 Census			✕	X	

**SERVICE PRIORITIES 10 – INTERLIBRARY LOAN (ILL)<sup>23</sup>**

1. Goal Statement: MHLS will coordinate interlibrary loan services for member libraries to borrow from nationwide collections and for libraries outside the region (e.g., SEAL) to borrow from member library collections.
2. Intended Result(s):
  - a. Member libraries will have access to the borrowing and lending of material outside of MHLS and regional (SEAL) holdings.
  - b. Libraries outside the region (e.g., SEAL) will have access to material from member library collections.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from ILL users.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors resulting in the evaluation and rating of this service.
  - d. Periodic review by MHLS Resource Sharing Advisory Committee of this service.
4. Moving Forward Assessment Report: <http://midhudson.org/wp-content/uploads/2015/03/Interlibrary-Loan-Services-Assessment-Report.pdf>

A. ILL Use Statistics					
	2017	2018	2019	2020	2021
Review use statistics to determine if appropriate balance between borrowing and lending is being maintained. Report findings to MHLS stakeholders.	✕	✕	✕	X	X

<sup>23</sup> Indicate how the system coordinates and facilitates Interlibrary Loan and expected changes or improvements to the process.

**SERVICE PRIORITIES 11 – CONSTRUCTION<sup>24</sup>**

1. Goal Statement: MHLS will provide administration of the State Aid for Public Library Construction Grant Program as awarded by the State, and provide consultation to member library directors and member library boards in support of the assessment, development, planning, and funding of library facilities.
2. Intended Result(s):
  - a. MHLS member library directors and member library board presidents will have advanced notice of grant availability, information and continuing education about application procedures and priorities, grant writing assistance, and award recommendations based on a transparent MHLS Board directed process.
  - b. MHLS member library directors and member library boards will have:
    - Facilities that meet the needs of their communities based on community assessment
    - Pre-design project planning assistance
    - Best practice design project planning assistance
    - Understanding of funding options
  - c. MHLS member library directors and member library boards will have access to on-site/in-person consultations in support of the assessment, development, planning, and funding of library facilities.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on member library directors and member library board comments.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors and board presidents resulting in the evaluation and rating of administration of this service.
  - d. Report to and confer with the Directors Associations and the MHLS Board of Trustees on the State Aid for Public Library Construction Grant Program, and the assessment, development, planning, and funding of library facilities.
  - e. Annual review and analysis by the MHLS Board Incentive Committee of priorities, procedures, economically disadvantaged community definition, and ranking process.
  - f. Assess percentage of annual NYS construction fund allotment awarded to member libraries.
4. Action Plan – Continuing Services: Ongoing Construction Services are reported in the Moving Forward Assessment Report at: <http://midhudson.org/wp-content/uploads/2015/03/Construction-Program-Services.pdf>
5. Action Plan – New Activities:

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<sup>24</sup> Describe the process the system uses to publicize the State Aid for Libraries Construction Program (Education Law §273-a), assist members, assess construction needs, determine priorities, and review and approve applications. Include methods by which the system and its members will ensure that residents of the system's service area have access to modern, accessible library buildings.

A. Facility Stewardship					
	2017	2018	2019	2020	2021
Support for pre-design/best practice project planning focusing on sustainability components including energy efficiencies <sup>25</sup>	✕	✕	✕	X	X
Support for pre-design/best practice project planning focusing on accessibility of library facilities	✕	✕	✕	X	X

  

B. MHLS Construction Priorities					
	2017	2018	2019	2020	2021
<del>Plan an Incentive Committee review process of setting MHLS construction priorities to include review and comments by MHLS member library directors on proposed priorities</del>	✕				
Incentives Committee's review of MHLS construction priorities will include comments by MHLS member library directors on proposed priorities		✕		X	

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<sup>25</sup> e.g., 10% Challenge: education, modeling and mobilization of libraries so they can achieve a minimum of a 10% energy savings in their facility



## **SERVICE PRIORITIES 12 – COMMUNICATIONS AMONG MEMBER LIBRARIES<sup>26</sup>**

1. Goal Statement: MHLS will coordinate an integrated system of communication for directors, staff, trustees, and Friends of member libraries for purposes of resource sharing, library development, and cooperative networking.
2. Intended Result(s):
  - a. Member libraries will increase their knowledge and understanding of best practices; local, regional and national trends, statistics, and issues impacting library service; and MHLS services and operations.
  - b. Member libraries will have peer-networking opportunities, online and face-to-face.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on directors, staff, trustees, and Friends of member libraries comments.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this goal.
  - c. Periodic feedback from member library directors in the evaluation and rating of this goal.
4. Action Plan – Continuing Services: Ongoing Communication Among Member Libraries  
Services are reported in the Moving Forward Assessment Report at:  
<http://midhudson.org/wp-content/uploads/2015/03/Communications-Among-Member-Libraries.pdf>
5. Action Plan – New Activities:

A. Assessment of Communication Infrastructure					
	2017	2018	2019	2020	2021
<del>Survey of stakeholders to determine effectiveness of MHLS weekly Bulletin</del>	✕				
Survey of stakeholders to determine effectiveness of MHLS social media			X		

B. Roundtables <sup>27</sup>					
	2017	2018	2019	2020	2021
<del>Develop Guidelines for Roundtable Establishment &amp; Management</del>	✕				
Cataloging Roundtable		✕			
Local and/or Rare Materials Roundtable			✕	X	
Social Media			✕	X	

<sup>26</sup> Explain how the system communicates with its members and/or branches and how the system facilitates library to library communications – for purposes of resource sharing, direct access, and all other purposes.

<sup>27</sup> MHLS Roundtable is composed of member library staff interested in sharing experiences, best practices, and ideas to improve their understanding and use of a particular services or product.

**SERVICE PRIORITIES 13 – COORDINATED OUTREACH<sup>28</sup>:**

1. Goal Statement: MHLS will support improved library services for persons who are educationally disadvantaged, members of ethnic or minority groups in need of special library services, unemployed, blind, physically disabled, have developmental or learning disabilities, or who are aged or confined in institutions.
2. Intended Result(s):
  - a. Member libraries will have information and support to develop programs and services to attract and connect to outreach target populations and form relevant community partnerships at the local level.
  - b. Institutions serving targeted populations will have the opportunity to participate in community based partnerships<sup>29</sup> facilitated by MHLS to improve outreach services.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from member library directors participating in MHLS supported outreach services.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors resulting in the evaluation and rating of this service.
4. Action Plan – Continuing Services: Coordinated Outreach if reported in the Moving Forward Assessment Report at: <http://midhudson.org/wp-content/uploads/2015/03/Coordinated-Outreach-Assessment-Summary.pdf>
5. Action Plan – New Activities:

A. New York State Outreach Categorical Aid Program					
	2017	2018	2019	2020	2021
Annual orientation for MHLS sponsored special populations grant program.		✕	✕	X	X

<sup>28</sup> System services for persons who are educationally disadvantaged or who are members of ethnic or minority groups in need of special library services, or who are unemployed and in need of job placement assistance, or who live in areas underserved by a library, or who are blind, physically disabled, have developmental or learning disabilities, or who are aged or confined in institutions (Education Law §273 (1) (h) (1) )

<sup>29</sup> For example: Spark Media Project, Division of Juvenile Justice and Opportunities for Youth (DJJOY), One-Stop (Dutchess County Workforce Development)

### **SERVICE PRIORITIES 14 – YOUTH SERVICES<sup>30</sup>**

1. Goal Statement: MHLS will provide member library directors and member library staff with partnership opportunities to support services for youth.
2. Intended Result(s):
  - a. Member libraries will have the opportunity to participate in community based partnerships<sup>31</sup> facilitated by MHLS to improve youth services.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from member library directors participating in MHLS supported youth services.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from member library directors resulting in the evaluation and rating of this service.
4. Action Plan – Continuing Services: Youth Services are reported in the Moving Forward Assessment Report at: <http://midhudson.org/wp-content/uploads/2015/03/Youth-Services-Assessment-Summary.pdf>
5. Action Plan – New Activities:

<b>A. Die Cuts</b>					
	2017	2018	2019	2020	2021
<del>Discontinue circulating shape cutting machines, shipping cases, &amp; die cuts, offer machines, cases, and die cuts to member libraries</del>		✕			

<b>B. Buzzer System</b>					
	2017	2018	2019	2020	2021
<del>Discontinue circulating MHLS held buzzer system for Battle of the Books, offering buzzers to member libraries participating in the Battle of the Books</del>		✕			

<b>C. Button Maker</b>					
	2017	2018	2019	2020	2021
<del>Discontinue providing circulating Button Maker</del>		✕			

<sup>30</sup> Services for youth to age 18 exclusive of early literacy (0 to school entry) programming

<sup>31</sup> For example: MHLS Battle of Books, Spark Media Project, Book Distribution Program of the Empire Center for the Book

D. Kids Port Website					
	2017	2018	2019	2020	2021
<del>Assess use, cost, and value of Kids Port Website</del> <a href="http://kidsport.midhudson.org/">http://kidsport.midhudson.org/</a>		✕			

### **SERVICE PRIORITIES 15 – EARLY LITERACY<sup>32</sup>**

1. Goal Statement: MHLS will provide administration of the NYS Family Literacy Library Services Grant Program<sup>33</sup> as awarded by the State Library/DLD to MHLS.
2. Intended Result(s):
  - a. Member libraries will be offered training in support of making their library a vital community partner and early learning hub in their community.
  - b. Member libraries participating in the MHLS Early Literacy Cohort Program will receive support and resources to implement early literacy related services in their library.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from member library directors participating in the MHLS Early Literacy Cohort Program.
  - b. MHLS annual report to stakeholders on Moving Forward Services Assessment of this service.
  - c. Periodic feedback from directors of member libraries participating in the MHLS Early Literacy Cohort Program resulting in the evaluation and rating of this service.
  - d. MHLS Board of Trustees review and approval of MHLS plan for grant implementation.
  - e. Number of continuing education sessions, number of participants attending continuing education, and evaluation by attendees at each session reviewed by MHLS staff.
  - f. Member libraries participating in MHLS Early Literacy Cohort Program will report on the increased capacity of their library to provide improved early literacy services for the public.
  - g. MHLS report<sup>34</sup> to the State Library/DLD on services provided by the libraries participating in NYS Family Literacy Library Services Grant Program.
4. Action Plan – Continuing Services: Early Literacy was not a service included in the Moving Forward Assessment Reports
5. Action Plan – New Activities:

<b>A. NYS Family Literacy Library Services Grant Program</b>					
	2017	2018	2019	2020	2021
<del>Grant program established in 2016-17, no new activities proposed</del>					

<sup>32</sup> Services for birth to school-age children with their families/caregivers

<sup>33</sup> \$14,000 each year for 3 years (2016/7; 2017/8; 2018/9)

<sup>34</sup> A compilation of reports on results from each library participating in NYS Adult Literacy Library Services Grant Program

**SERVICE PRIORITIES 16 – ADULT LITERACY<sup>35</sup>**

1. Goal Statement: MHLS will provide administration of NYS Adult Literacy Library Services Grant Program<sup>36</sup>, as awarded by the State Library/DLD to MHLS, for eligible member libraries.
2. Intended Result(s):
  - a. Eligible member libraries will receive NYS Adult Literacy Library Services Mini-Grants to develop and expand adult literacy programs.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from member library directors participating in the NYS Adult Literacy Library Services Grant Program.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from directors of member libraries participating in NYS Adult Literacy Library Services Grant Program resulting in the evaluation and rating of this service.
  - d. MHLS Board of Trustees review and approval of MHLS plan for grant implementation.
  - e. MHLS report<sup>37</sup> to the State Library/DLD on services provided by the libraries participating in NYS Adult Literacy Library Services Grant Program.
4. Action Plan – Continuing Services: Adult Literacy is reported in the Moving Forward Assessment Report at: <http://midhudson.org/wp-content/uploads/2015/03/Adult-Literacy-Assessment-Summary.pdf>
5. Action Plan – New Activities:

<del>A. NYS Adult Literacy Library Services Grant Program</del>					
	2017	2018	2019	2020	2021
<del>Grant program established in 2016-17, no new activities proposed</del>					

<sup>35</sup> Services for adults age 16 and over who are not enrolled in school.

<sup>36</sup> \$9,000 each year for 3 years (2016/7; 2017/8; 2018/9)

<sup>37</sup> A compilation of reports on the results from each library participating in NYS Adult Literacy Library Services Grant Program.

**SERVICE PRIORITIES 17 – COOPERATIVE EFFORTS WITH OTHER LIBRARY SYSTEMS<sup>38</sup>**

1. Goal Statement: MHLS will cooperatively work with other public library systems, school library systems, and reference and research library resources systems.
2. Intended Result(s):
  - a. Member libraries will benefit from enhanced opportunities for resource sharing and advocacy.
  - b. Library staff will benefit from professional development opportunities provided through cooperative and collaborative efforts.
  - c. Member libraries will benefit from MHLS staff exchanging information with the staff of other public library systems, school library systems, and reference and research library resources systems.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from other public library systems, school library systems, and reference and research library resources systems.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Period feedback from selected library systems resulting in the evaluation and rating of this service.
4. Moving Forward Assessment Report: <http://midhudson.org/wp-content/uploads/2015/03/Cooperative-Efforts-with-Other-Library-Systems.pdf>
5. Action Plan – New Activities:

<b><u>a. Partnerships</u></b>					
	2017	2018	2019	2020	2021
<del>Partner with New York Center for the Book to support the annual holiday book distribution sponsored by Barnes &amp; Noble</del>	✕	✕			

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<sup>38</sup> Explain how the system collaborates with other public library systems, school library systems, and reference and research library resources systems.

**SERVICE PRIORITIES 18 – CORRECTIONAL FACILITIES<sup>39</sup>**

1. Goal Statement: MHLS will provide state and county correctional facilities with library materials and services.
2. Intended Result(s):
  - a. State correctional facilities will benefit from their annually negotiated Plan of Service as per Guidelines for the New York State Public Library System Services to State Correctional Facility Libraries State Aid Program.
  - b. County correctional facilities will receive newly purchased library materials funded by the Inter-institutional Aid Program.
3. Evaluation Method(s):
  - a. Ongoing assessment by MHLS staff for continuous service improvement based on comments from State correctional facilities librarians and county correctional facilities administrators.
  - b. Annual report to stakeholders on Moving Forward Service Assessment of this service.
  - c. Periodic feedback from State correctional facilities librarians resulting in the evaluation and rating of this service.
  - d. Ongoing review by MHLS staff of the needs and trends of state correctional facilities regarding interlibrary loan & reference services, collection development, consultant services, continuing education, programs, and regional re-entry guides.
  - e. Ongoing review by MHLS staff of the needs and trends of county correctional facilities' collection development and regional re-entry guides.
4. Moving Forward Assessment Report: <http://midhudson.org/wp-content/uploads/2015/03/Correctional-Facilities-Services-Assessment-Summary.pdf>
5. Action Plan – New Activities:

A. State Correctional Facility Libraries Program					
	2017	2018	2019	2020	2021
Identify and promote opportunities for MHLS member libraries to contribute to State Correctional Facility Library services.	✖	✖	✖	X	X

<sup>i</sup> Examples of periodic feedback includes surveys and focus groups

<sup>ii</sup> Consultant reports for DA and MHLS Board meetings

<sup>39</sup> Services for people who are incarcerated in state or county correctional facilities (Education Law §285)



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<sup>iii</sup> Examples of conferring included DA table talk discussions and round table discussions with MHLS Board

<sup>iv</sup> MHLS will develop the MHLS Action Plan, which will list the key actions MHLS will undertake in order to achieve each specific goal, including what resources are required to reach the goal

## **SUPPORTING DOCUMENTS**

Stakeholders to Prioritize MHLS Services – Survey Findings

<http://da.midhudson.org/wp-content/uploads/2016/04/Survey-of-Service-Priorities-MHLS-Stakeholders-Combined-04152016.pdf>