Montgomery County Library and Information Network Consortium (MCLINC)

Strategic Plan

July 1, 2023 - June 30, 2027

01 Table of Contents

MCLINC ENCOURAGES AND SUPPORTS BEST PRACTICES, INDUSTRY STANDARDS, AND INNOVATIVE NEW IDEAS.

MCLINC is a non-profit 501(c)(3) organization whose members are public libraries in Montgomery County, Pennsylvania. MCLINC is an independent entity which is supported by member fees, and foundation, corporate, and individual grants.

MCLINC provides independently governed and funded libraries the opportunity to cooperatively purchase and operate automation services, in order to provide the best possible public service to the residents of Montgomery County through the sharing of resources.

MCLINC was formed in 1995 in order to purchase and operate an integrated online library system (ILS) for the benefit of the residents of Montgomery County. MCLINC is a consortium created by the libraries of Montgomery County, managed by a non-profit board, that provides centralized expertise and technical assistance to the entire consortium. By using group purchasing power, the most cost-effective telecommunications and the experience of others, MCLINC will bring substantially enhanced library service to the residents of Montgomery County.

03

MCLINC MEMBER LIBRARIES

- Abington Township Public Library
- Cheltenham Township Library System
- Free Library of Springfield Township
- Horsham Township Library
- Huntingdon Valley Library
- Jenkintown Library
- Lower Merion Library System
- Lower Providence Community Library
- Montgomery County-Norristown Public Library
- Narberth Community Library
- Pottstown Regional Public Library
- Upper Dublin Public Library
- Upper Merion Township Library
- Upper Moreland Free Library
- William Jeanes Memorial Library
- Wissahickon Valley Public Library

MCLINC PLANNING COMMITTEE

- Elizabeth Fitzgerald, Chair, Abington Township Public Library
- Marija L Skoog, Lower Providence Community Library
- Karen DeAngelo, Montgomery County-Norristown Public Library
- Lisa Clancy, William Jeanes Memorial Library
- Cherilyn Fiory, Upper Dublin Public Library
- Laura Arnhold, Upper Merion Township Library
- Michelle Kehoe, MCLINC Executive Director
- David Belanger, Library Consultant

"It is incredibly difficult to manage the needs of so many different, independent libraries but MCLINC does a good job of balancing what every library needs."
MCLINC Staff Survey

Purpose and Core Values

PURPOSE: BUILDING A BETTER COMMUNITY THROUGH LIBRARY COLLABORATION AND COOPERATION.

CORE VALUES

Customer Experience
- We treat internal and external customers with respect.
- We create a seamless customer experience.

Access
- We provide equal, confidential, and convenient access to services and information.
- We eliminate physical and procedural barriers to use.
- We champion the user's right to read, seek information, and exchange ideas.

Collaboration and Innovation
- We respond to the changing needs of our communities with innovative solutions.
- We work together to strengthen services and achieve mutual goals.
- We enhance the impact of our resources and reduce costs through sharing and partnerships.

Research Process

PLAN DEVELOPMENT PROCESS AND METHODOLOGY

In October 2022, MCLINC contracted with David Belanger of DL Belanger Consulting, LLC to develop a new strategic plan for the organization. Mr. Belanger's background includes 36 years of library experience, including six years as the director of a MCLINC member library. During his tenure in a MCLINC member library, he served on the MCLINC Board of Directors, including two years as Board President.

Working with the MCLINC Planning Committee, a process for developing the plan was created. This process included updating the organization's Purpose and Core Values, surveying member library staff, conducting a comparison to peer organizations, interviewing non-member libraries in Montgomery County, convening staff focus groups, and holding a Board retreat. The Planning Committee reviewed and provided feedback for the data-gathering methods.

The planning process began with a review of MCLINC's Purpose and Core Values. The document was developed by MCLINC in 2019. The MCLINC Board was asked to examine the organization's purpose and values to determine if the concepts continued to be relevant to post-pandemic libraries. After a thorough discussion and minor changes, the Board reaffirmed MCLINC's Purpose and Core Values.

The next step in the process was to survey staff in member libraries. The goal of the survey was to solicit input from a wide range of library staff, to understand their knowledge of MCLINC and how the organization could serve libraries better.

"The committee/consortium model helps in collaborative efforts without making people feel like they're being given a directive from libraries that aren't their own."
MCLINC Staff Survey

Based on input from the staff survey, focus groups were organized based on job responsibilities. Seven focus groups were conducted with reference staff, MACs (MCLINC Automation Committee), library directors, circulation staff, cataloging staff, HQ staff, and children's/other staff.

The consultant also surveyed and interviewed the non-MCLINC libraries in the county. He identified peer organizations across the country that provide similar services to MCLINC and asked them to complete an online survey. Three of the peer organizations were interviewed for additional insights.

The Planning Committee reviewed all data gathered and then it was shared with the entire Board. Using the data collected as a starting point, the directors met at a Board retreat to identify the organization's Strengths, Weaknesses, Opportunities, and Threats (SWOT). After the SWOT analysis, board members were asked to identify trends impacting MCLINC from the research. From the trends discussion, key goals for the organization were identified.

Using the key goals from the Board retreat, the Planning Committee met to detail and explore the activities that would lead MCLINC into the future. From the Planning Committee meetings, a draft of the Strategic Plan was created for presentation to the full MCLINC Board. With input from the Board, the Plan was finalized.

07 Key Research Findings

FROM THE STAFF SURVEY

The staff survey focused on the key MCLINC services and satisfaction with those services. Several of the questions were based on a similar survey done in 2018. As noted in the chart below, satisfaction with key services generally increased between 2019 and 2023. There were significant increases in satisfaction with training and tech support. The only service with a decrease in satisfaction was internet access/speed. This is unusual since MCLINC switched from a frame relay network to a fiber network between the surveys.

SERVICE SATISFACTION

■ 2018 Satisfaction*   ■ 2023 Satisfaction

Service	2018 Satisfaction*	2023 Satisfaction
Committee work	3.2	3.45
Upgrades	3.2	3.6
Function as a consortium	3.4	3.65
Training	2.5	3.3
Communications	3.15	3.5
Tech Support	3.25	3.9
Catalog	3.7	3.85
Website	3.45	3.7
Internet Access/Speed	3.85	3.8

*In 2018 the term Effectiveness was used to describe satisfaction.

Other highlights from the survey

- The survey reached a broad range of library staff; 322 surveys were completed, more than half the staff of member libraries
- There is confusion about District services and MCLINC services
- Communication, training, and committees were rated both positively and negatively
- The use of Leap (a cloud-based ILS interface) also generated conflicting opinions

FROM THE FOCUS GROUPS

- Questions used were to clarify contradictions in the survey
- Staff want to understand what MCLINC does and how it operates
- Staff want clarity about the roles and responsibilities of committees
- There is confusion about the communication process and how decisions are made and information is distributed
- There is a desire to make better use of the ILS, including possible replacement
- There is a commitment to providing good customer service

FROM THE PEER SURVEY AND INTERVIEWS

- Peer organizations tend to have more members and larger budgets
- 5 of the 7 organizations have centralized cataloging Most do not manage the wide-area-network or handle the e-rate funding
- Peer organizations are willing to share the resources they have developed

FROM THE NON-MEMBER INTERVIEWS

- The non-member libraries in the county aren't aware of how MCLINC operates
- The non-member libraries don't understand the advantages and services of MCLINC
- Cost is a major obstacle for the non-member libraries

FROM THE BOARD RETREAT

Based on the research and SWOT analysis, the Board identified three key themes related to the future of MCLINC and developed a rough outline of the goals and objectives. The key themes are:

- Foundational: What is MCLINC and how does it operate
- Communication: How to distribute information and receive feedback
- End-user experience: for both internal and external customers

"Continue to work toward providing a seamless customer user experience through standard practices."
MCLINC Staff Survey

Goal 1: Foundational: What is MCLINC? – Establish a clear understanding of MCLINC.

- Objective 1.1 – Define and document what MCLINC does and how it operates
- Objective 1.2 – Develop a transparent and sustainable budget process, with clear financial reporting
- Objective 1.3 – Analyze HQ structure to ensure that member library needs are being met
- Objective 1.4 – Define and clarify the purpose and expectations for committees

Goal 2: Communication – Determine best practices and tools for MCLINC communications.

- Objective 2.1 – Define clear communication channels that are easy to use with defined roles and responsibilities that prioritize transparency
- Objective 2.2 – Create tools and a process to share decisions
- Objective 2.3 – Create a marketing plan for both internal and external customers

Goal 3 – User Experience – Create a seamless user experience, which is at the heart of what MCLINC does for the public and staff.

- Objective 3.1 – Develop standardized MCLINC policies, procedures, and services
- Objective 3.2 – Develop and enhance the shared integrated library system (ILS)
- Objective 3.3 – Explore new services, such as a universal library card, an overlay, foreign language interface, a MCLINC app, centralized cataloging
- Objective 3.4 – Create a training program for MCLINC services and standards
- Objective 3.5 – Encourage and enable all libraries in the county to join MCLINC
- Objective 3.6 – Collaborate with the District on services, i.e. electronic resources

12

Appendix

MCLINC Strategic Planning Staff Survey

Summary – January 2023

As part of the strategic planning process for the Montgomery County Library Information Network Consortium (MCLINC), the staff of the 16 member libraries were asked to complete an online, anonymous survey. The goal of the survey was to gather their input on the current state of the Consortium and their ideas for future success. The survey was developed by the consultant with input from the MCLINC Planning Committee. For comparison some questions were based on the survey done in 2018.

The link to the survey was distributed to the library director for each member library. The library director was responsible for distributing the survey to staff. Staff from the MCLINC Headquarters were also encouraged to complete the survey. The survey was distributed to a wider group of staff members than in 2018. As this wider group might not be fully familiar with MCLINC, they were encouraged to complete the survey to the best of their knowledge.

Generally speaking, the survey showed a dichotomy in responses. Communication was rated as both a positive and a negative; some staff preferred virtual meetings, while others welcomed the return to in-person meetings; and while most respondents indicated they understood how MCLINC impacts their library, there were many responses in the open-ended questions that related to District and non-consortium functions. These contradictions will be explored in the focus groups.

A set of the full responses and a copy of the blank survey are available as separate documents.

Survey Demographics

- 322 staff members completed the survey out of over 600 total staff members, significantly higher than the 70 responses received in 2018.
- All 16 library directors completed the survey.
- Only 7 MACs completed the survey, this may be due to MACs having multiple duties and responding based on one of their other roles, e.g., Reference. This will be explored in the MAC focus group.
- The largest group of respondents were circulation staff, with 116 completed surveys, or 36% of the total.
- There was a near even split between responses from full-time (46%) and part-time (56%) staff.
- The tenure question showed that there are both many new employees and many long-term employees. 29% had 0-2 years' employment with MCLINC and 39% had more than 10 years.

General Questions

The survey allowed staff to rate "MCLINC" as either the consortium as a whole, or the MCLINC Head Quarters. Staff were asked three general questions related to MCLINC effectiveness. The scale ranged from 1 (totally disagree) to 5 (totally agree). The results were generally positive (agree or totally agree).

- MCLINC administration is responsive to my questions – 55% positive, 6% negative, and 39% neutral, average rank 3.65 (on the 5-point scale).

- I get needed information from MCLINC administration in a timely manner – 59% positive, 9% negative, and 33% neutral, average rank of 3.66.
- I understand how the MCLINC consortium impacts my library – 78% positive, 6% negative, and 16% neutral, average rank 3.97

In addition, staff with 5 or more years of experience were asked to rate the changes in MCLINC in the last five years. Most responses were positive 55% (better or much better), 37% said it was about the same, and 8% indicated it was worse or much worse.

When asked about their preferred method for receiving information from MCLINC, e-mail rated the highest followed by from supervisor, text message, ticketing system and intranet.

Ratings of Service Importance and Satisfaction

The following is a summary of the survey for key MCLINC services. Respondents were asked to rate the service's importance and then rank their satisfaction with the service. The results of the 2018 survey are included for comparison. The key services of MCLINC, the network (internet access, WiFi), website, and catalog, continue to be important, and staff are mostly satisfied with the services. There was an increase in the satisfaction of communication since 2018, and a significant increase for upgrades. Technical support saw a large increase in satisfaction. There was an increase in satisfaction for training, but it still remains one of the services with the least satisfaction. Of concern is the low rating of Leap, for both importance and satisfaction. Since Polaris is moving to a Leap -only program, this could impact adoption.

Service	2023	2018	2023 Satisfaction	2018 Effectiveness
Internet Access/Speed	4.9	4.82	3.82	3.85
Website	4.86	4.26	3.69	3.45
WiFi	4.86	Not asked	3.57	
Polaris	4.81	Not asked	3.76	
Catalog	4.79	4.76	3.85	3.72
Envisionware	4.73	Not asked	3.75	
Tech Support	4.68	4.84	3.9	3.24
Communications	4.56	4.61	3.53	3.13
Computer Upgrades	4.55	Not asked	3.82	
Training	4.54	4.63	3.32	2.52
Function as a consortium	4.54	4.55	3.68	3.42
Cataloging Tools	4.53	Not asked	3.75	
Upgrades	4.52	4.63	3.61	3.19
Leap	3.85	Not asked	3.39	
Committee work	3.57	3.7	3.43	3.19
Bulk purchasing	Not asked	3.8	N/A	

Sorted by 2023 importance
Scale 1 (low) to 5 (better)
Yellow - most satisfied
Green - least satisfied

Reactions to the MCLINC Values

Staff were asked to react to the values statements developed by the MCLINC Board. There was general agreement that the values were important. There was agreement that MCLINC is achieving those values, with room for improvement.

	Importance	Implementation
We treat internal and external customers with respect.	4.85	4.03
We provide equal, confidential, and convenient access to services and information.	4.85	3.94
We champion the user's right to read, seek information and exchange ideas.	4.79	4.11
We create a seamless customer experience.	4.7	3.62
We work together to strengthen services and achieve mutual goals.	4.66	3.57
We eliminate physical and procedural barriers to use.	4.65	3.54
We respond to the changing needs of our communities with innovative solutions.	4.63	3.95
We enhance the impact of our resources and reduce costs through sharing and partnerships.	4.61	3.72

Questions for Directors Only

Average rating based on a 1-5 scale:

- I feel the MCLINC consortium is responsive to the needs of member libraries – **3.56**
- I understand the MCLINC consortium and its goals – **3.88**
- I understand how the MCLINC consortium impacts my library's operations – **4.25**
- I feel the MCLINC board meetings make good use of my time – **3.81**
- The board materials are received in a timely manner and help me prepare for the meeting – **3.81**
- I can easily understand the MCLINC administrative financial reports – **3.44**
- The cost of membership is reasonable for the service provided – **3.43**
- My library would be willing to pay a higher membership fee for increased services (such as catalog enhancements and other databases) – **3.07**

Open Ended Question

Staff were asked three open ended questions: Top three things that MCLINC (either administration or consortium) does well; Three things MCLINC (either administration or consortium) could improve; Looking forward, what are your five top recommendations to improve MCLINC (either administration or consortium) services? Many comments were collected: 453 about things done well, 411 about improvements, and 453 suggestions for the future. The comment count does not include comments that relate to District Library functions (there were many delivery (Pony) comments) or comments that related to individual library operations (e.g., salaries).

Responses to the prompt to list **three things MCLINC does well** primarily focused on support, access, communication, ILS, and operations.

- Support – 129 comments, including:
    - Fixing glitches and problems with technology and Polaris/leap in a timely manner
    - Quick computer distribution and installs
    - "The current tech support team is fantastic. It's leaps and bounds above what it was when I started 10 years ago."
- Access – 74 comments, including:
    - Generally speaking, patrons get what they want and need through this partnership, very few complaints from patrons on what we do to get them their materials quickly.
    - Offers users wide variety of choice re: library locations, allowing patrons to choose the location(s) most convenient for them.
- Communication – 71 comments, including:
    - Administration noticeably listens more and more respectful to all levels of member library staff
    - Inform about any technical difficulties very quickly
    - Members do communicate so that as a whole, discussions happen about serving patrons in a changing environment
- ILS – 43 comments, including:
    - Polaris is an easy-to-use checkout/check-in system. Easy to enter a patron in for registration
    - Leap is an incredible web-based service, and I look forward to when Polaris is phased out entirely.
- Operations – A catch-all category for how MCLINC operates, 80 comments, including:
    - Board meets regularly and members are respectful of each other; immediate issues are resolved
    - Dedicated catalogers on our Database Committee - many go over-and-above to provide behind-the-scenes top quality cataloging services.
    - Moving away from 'well, this is how it was done 15-20 years ago and that's what we should still do.' This is especially true during the past couple of years.
    - Reprofiling, although a lot of work, was vital in cleaning up our database of information.

Responses to the prompt to list **three things MCLINC could improve** primarily focused on communication, ILS, uniformity, training, and operations.

- Communication – 108 comments, including:
  - Communicate more about upgrades - How will they enhance or affect existing products, functions, or services?
  - Communication of expectations and procedures (written, clear, easy to search) to both directors and staff - especially history of same. No one has any way of knowing what decisions were made at x meeting three years ago).
  - Direct communication to staff beyond administrators. (a common theme)
  - MCLINC could improve in keeping the branches up-to-date with other events, maybe via a newsletter of some sorts.
  - Send out periodic reminders on who does what at MCLINC so we have an idea on who to reach out to if we have a specific question.
- ILS – 64 comments, including:
  - It would be marvelous if more of the Leap features could be turned on to access across the board.
  - LEAP is, on the whole, a significantly worse-than-average software application.
  - Improving Polaris or getting a new system.
  - More user-friendly catalog.
- Uniformity – 43 comments, including:
  - Behaving more like a system and less like a consortium, for the benefit of patrons and branches alike (work in progress).
  - Mindset that MCLINC member libraries are separate entities and can't entirely act like a Library System.
  - More uniformity in policy would help create a more seamless patron experience (including applications, lost/damaged materials, etc.).
- Training – 42 comments, including:
  - Better trainings/more frequent trainings, even just as refreshers. (a common theme)
  - It would be helpful if more 'cheat sheets' could be available for staff who may need extra guidance (quickly).
  - Offer awareness trainings to library staff regarding MCLINC's role and services including website and intranet.
- Operations – A catch all category for how MCLINC operates, 60 comments, including:
  - MCLINC needs to reflect on need and relevancy of existing services and consider how it can best serve today's & tomorrow's member libraries (hopefully this process will help!)
  - Some of the longer tenured directors tend to react poorly when those who have been here for a shorter time question what has always been done. Meetings that are supposed to solve problems wind up becoming meaningless echo chambers.
  - Finding consensus among libraries (consortium & admin - I know it's hard!)
  - Leadership/goal setting for future. Bring new ideas to the group from attendance at conferences.
  - Sometimes the consortium confuses the District and County functions with the Administration / MCLINC functions.

Responses to prompt **what are your five top recommendations to improve MCLINC** primarily focused on ILS, communication, uniformity, training, and operations.

- ILS – 88 suggestions, including:
    - Continuing search for new PAC that can better meet needs of patron ease of use at a reasonable price - if such a PAC exists and doesn't bring new problems! (a common theme)
    - Clean up the catalog and work with libraries to do their part in keeping item info up-to-date.
    - Keep moving forward with LEAP and helping libraries transition with it and learn how to make it user friendly for library staff.
    - Integrate discovery platform to access magazine and journal articles from our website.
- Communication – 79 suggestions, including:
    - Clarity about protocols that are expected (for technology, materials, etc).
    - Communicate to EVERYONE when there's issues with Polaris/WiFi. (a common theme)
    - Communication in general excludes frontline staff, who are the most likely to interact directly with patrons, and therefore know about problems soonest
    - Encourage and improve conversation and quality of interaction between members of different libraries.
- Uniformity – 59 suggestions, including:
    - Better standardization among member libraries creating a better user (patron) experience.
    - Create a universal MCLINC library card so patrons can access online resources right away and don't need a temp card.
    - Stop trying to make all libraries the same.
- Training – 48 suggestions, including:
    - Complete Polaris training manual to onboard new circ desk staff.
    - Develop asynchronous training on Polaris functions that are commonly used across libraries or not-library-specific patron video training/instruction that libraries can share.
    - More in-person training about the system.
- Operations – A catch all category for how MCLINC operates, 90 suggestions, including:
    - Bring the remaining District libraries into MCLINC so that we can further increase MCLINC/District efficiencies.
    - Conduct a study for patrons to see what services they'd like for us to provide.
    - More involvement of pertinent staff in decision making process.
    - Rename; the name is so confusing to patrons.

Need for Follow-Up

Based on the survey response, the following topics/questions will be explored during the focus group meetings:

- Why did only 7 MACs respond? Did they answer under another job duty?
- In the survey, communication was listed as both a positive and a negative. What makes communication better or worse? What do you mean when you say "communication"?
- What channel do you prefer to receive information? Who should get the information sent by MCLINC?
- Committee work was rated as less important with low satisfaction. What could make committees more useful and productive? There were comments that in-person and virtual meeting were preferred. Please provide more insights.
- In the survey there were comments that we should standardize policies and be more like a system, there were other comments that we need to respect the independence of local libraries. How do you reconcile this paradox?
- Leap was rated as less important with less satisfaction in the survey. In the open-ended questions, along with Polaris in general, it was both a positive and a negative. What are your specific concerns about Leap? (It's where Polaris is headed.)
- Training was also mentioned as a positive and a negative. What does ideal training look like?

MCLINC Peer Survey Summary

February, 2023

In order to benchmark the services of MCLINC, a survey was sent to nine peer organizations. Seven organizations responded to the survey. Based on the survey responses, three of the organizations were contacted for a one-on-one interview to further explore their services.

The peer organizations were from across the country, and included the Main Library Alliance and BCCLS cooperatives in northern New Jersey. Also surveyed was the WAGGIN consortium in western Pennsylvania, and the Pennsylvania Integrated Library System (PaILS/SPARK). The full survey summary is available, as are the notes from the one-on-one interviews.

Key findings:

- All seven organizations provide a shared ILS for their members, the majority are using Polaris (4)
- The number of participating libraries ranges from 20 (WAGGIN) to 115 (SPARK); two organizations include school and academic libraries, but the vast majority are public libraries
- Most of the organizations are somewhat satisfied with their ILS. Main noted: "All ILSs are deficient in some significant way. Polaris is better than most."
- The average budget for the organizations is over $2,000,000
- Six of the seven organizations rely on member dues for their budget; three receive state and/or municipal funding. Main has recently hired a part-time Development Officer
- The funding formulas are complex
- Five of the organizations provide centralized cataloging
- Most provide e-content
- Only 3 manage the wide area network connecting the libraries
- All provide training, some provide training in general library operation
- Central office staffing ranged from 3 FTE to 17 FTE
- Only 3 provide the computers for the libraries
- The Main Library Alliance is interested in partnering with MCLINC on projects
- The Cooperative Computer Services in Illinois provided some excellent supporting documentation, including an organizational chart, a new director orientation summary, and a decision-making chart (very good)
- CCS will share their online training modules

MCLINC Non-Member Survey

February, 2023

Three of the four non-member libraries were surveyed to learn about their technology needs and possible interest in becoming a member of MCLINC. The surveyed libraries were Indian Valley, Lansdale, and North Wales. The newly hired director of the Hatboro Library did not respond to an interview request.

Each library was asked a series of questions about their current technology and their understanding of MCLINC. Below is a summary of key findings. The full interview notes are available.

Key findings:

- Both Indian Valley and North Wales are using the state supported SPARK ILS. It enables them to share resources between the two locations. Lansdale uses The Library Corporation, but is looking to migrate.
- Indian Valley and North Wales are happy with the SPARK system:
  - The Indian Valley Library Director is on their Board
  - They have a lot of input into the operation
  - Currently have Novelist and the Chili Fresh catalog overlay (may need to cut one due to budget issues)
- Perceived cost was the primary roadblock to the libraries joining MCLINC, especially the initial costs
- In general, the libraries didn't understand the role of MCLINC
- The libraries never received a formal "sales call" from MCLINC encouraging them to become a member
- Marketing materials are needed to describe the MCLINC advantages
- The libraries do not understand the benefits of MCLINC beyond supplying a shared ILS:
  - Network management and support
  - E-rate processing
  - Additional technology support
  - A community of users
  - MCLINC provides staff computers
  - Increased patron satisfaction
  - Providing almost access to 3 million books and other items in just a few days
  - Patrons would not have to register in two libraries
  - Access to Sky River for improved and faster cataloging
  - Staff savings from direct patron initiated holds (would be partially off-set by an increase in filling holds for other MCLINC libraries)
  - Staff savings on not having to support all the technology
  - Staff savings on processing e-rate

Focus Group - Database

February 1, 2023

	Priorities
Communication:	• Would like e-mails sent to the whole MCLINC distribution list (12 points), if the Internet or Polaris is down send to everyone (8 points), need to get information sooner (6 points) • Want to know that a ticket was submitted (5 points) and the estimated time for resolution (7 points) • Don't always get information from the director (4 points), distribute Board decisions (6 points), monthly summary of actions (2 points)
Committees:	• Keep on Zoom (15 points), have live meetings once a year (10 points), getting better at Zoom/should use chat more (2 points) • Limited staff (4 points), interaction is good, but distance is an issue (4 points) • Would like to have a discussion board like the MACs do (6 points)
Leap:	• Not for cataloging, needs work (3 points), acquisitions not good (2 points)
Training:	• Training in smaller bites on specific topics (10 points) • Need training on how to catalog the MCLINC way (9 points) • Create an expert pool and have mentors for new staff (6 points) • Would be helpful to have a contact person for questions (6 points) • Zoom cameras for staff computers (4 points*)
Uniformity/Act Like a System:	• *No significant points given*
Big Ideas for the Future:	• Tech services person on staff - full-time staff member trained specifically in cataloging, acquisitions, etc. (19 points*) • Library of Things and software to manage (9 points*) • Subscription to Web Dewey (8 points*) • Catalog overlay (7 points*) • App (7 points*)

*weighted because some staff had to leave early

Focus Group - MACs

February 14, 2023

	Priorities
Communication:	• *Need to understand MCLINC* - What is MCLINC? What does it do? (6 points), Is MCLINC an IT department? (3 points), Need MCLINC marketing materials (5 points) • Like e-mail (8 points) *although* E-mail is sometimes cryptic (4 points) • Tech Notes, keep up to date (8 points) • Train different levels of MACs (6 points) Don't need to treat all libraries the same (2 points) • With the ticketing system, sometimes get attitude (3 points)
Committees:	• Hybrid meetings (10 points) • Same topics are discussed at different committees and decisions are not communicated to other committees (7 points) • Who do the committees serve? MCLINC, the directors, the group? (3 points), What is the purpose and scope of the committees (1 point) • Want agendas and useful minutes (4 points), • Cancel meetings if no content (2 points), User generated topics sometimes dismissed (3 points)
Leap:	• Want a deadline to require using Leap, even if Polaris doesn't require it (7 points) • Who should know about Leap, MACs or Circ? (4 points)
Training:	• Need an orientation, could be at one of the monthly meetings (7 points), A welcome booklet (6 points) • Individual training at libraries (3 points)
Uniformity/Act Like a System:	• Technology is good, set deadlines (6 points), • Standardization of tech allows MACs to help each other (4 points) • Want patrons to know what to expect (3 points)
Big Ideas for the Future:	• Understanding of what MCLINC does (7 points), A report on what MCLINC does (2 points), An Annual Report (5 points) • Discussion forums on various topics (6 points), Exploratory group to look into current and future technology (1 point), Tech about new stuff, i.e. ChatGPT (1 point) • More staff, an ILS expert (2 points), IT staff (1 point) • Written, accessible policies (3 points)

Focus Group - Directors

February 15, 2023

	Priorities
Communication:	• More professional communication, don't talk down to staff (13 points) • Need clearer channels (7 points), Need better communication from directors to staff (4 points) • Organizational chart (5 points), Internal marketing (3 points) • Longer hours at HQ, or an on-call system (7 points) • Sometimes get mixed signals (3 points) • Consistent (2 points) • Minutes from committee meetings (2 points) • Communication heading (1 point) • Not getting notification of things being resolved (1 point) • Need details sooner (1 point) • Let directors know what staff need to know (1 point) • Document more, all in one easy to access place (1 point) • Clarity on who gets to decide what (1 point) • Communication heading (1 point) • Training for ticketing (1 point) • Off-hours phone number (1 point) • Newsletter on what's happening (1 point)
Committees:	• Clarity of purpose, board too (9 points) • When were the committees formed? Rethink them (4 points), Rethink meeting formats (3 points) • Broader discussions on decisions (3 points) • Organizational chart (2 points) • What is the role (1 point)16 • HQ has favorites (1 point) • Staffing and distance issues are problems (1 point)

Leap:	• Need to know who should be using it and why (3 points)
	• Potential is great, outreach (1 point)
	• *The catalog in general:*
	  ○ Improve the user experience in the catalog (6 points), Look at how we can use Polaris better (4 points), Clean up the catalog, need process (4 points)
	  ○ Need better financial decisions for the future (4 points)
	  ○ At the mercy of the catalogers (3 points)
	  ○ Centralized cataloging (2 points)
	  ○ Want to be able to enter dates closed, found some typos by HQ (1 point)
	  ○ Calendar of catalog activities, i.e. when to purge patrons (1 point)
	  ○ Permissions (1 point)
	  ○ Switching systems is expensive, have to consider cost to retrain staff, lots can go wrong (1 point)

	• What is MCLINC? (17 points) • Want onboarding for directors and MACs (3 points)

Training:	- On-line and available to everyone (3 points) - Core competencies (4 points) *General heading* (4 points) - Distinction between policy and procedures (2 points) - Define who is responsible for what training (2 points)
Uniformity/Act Like a System:	- Communicate why we are changing (7 points) - Consider the patrons (6 points) - More thought on what MCLINC can decide (4 points)
Big Ideas for the Future:	- Share staff and resources (7 points) - County-wide – all libraries (4 points) - DEI/Belonging, the library is for everyone (3 points) - Marketing to the public, District services too (3 points) - Respond to societal disruption (3 points) - Be ahead of the technology curve (2 points) - Diversify funding (1 point) - Public spaces needed (1 point) - Stronger ties with stakeholders (1 point) - Share community resources/social services (1 point)

Focus Group - Circulation

February 15, 2023

	Priorities
Communication:	• Document policies (14 points) • Need to share information from other committees (10 points) • Message board that is easy to get to (6 points) • More people should get the e-mails (6 points) • Need information on nights and weekends (4 points)
Committees:	• Want results – talk less, make more decisions (12 points), Board decision sometimes need more input from circ (4 points) • Hybrid meetings (13 points) • Closing the loop between committees (8 points) *see above also* • Documentation of policies (7 points) *see above also*

Leap:	• Need training (6 points)
	• *The catalog in general*
	    ○ Permissions (11 points)
	    ○ Want a "see all" editions (5 points)
	    ○ Make catalog simpler (4 points)
	    ○ Want a more responsive vendor (4 points)
	    ○ Local bib record should be at the top of the list (4 points)

Training:	• Skeleton training for circulation managers, with consortium expectations (17 points) • Simply reports (6 points), Reports (4 points) • MCLINC 101, to cover District vs. MCLINC vs. local library (9 points) • Leap training (6 points)
Uniformity/Act Like a System:	• Goal to be patron friendly (8 points) • Big picture stuff should be standardized (8 points) • Review policies to determine if they are working (4 points), Truly implement standardized policies (3 points)
Big Ideas for the Future:	• Universal MCLINC card (3 points), Digital cards (1 point) • Ability to reserve realia, i.e. museum passes, library things, meeting rooms (2 points)

Focus Group - Reference

February 17, 2023

Overview

The key discussion points were posted on the meeting room walls. Participants were then given 12 "points" to vote for their most important aspects of the discussion. Similar topics are grouped together.

Priorities

Communication:	• *Need to distribute information wider* - Funneling of information, it is not always getting down to staff (6 points), Send out information to a broader group (4 points), • Want more information about MCLINC operates - Would like a better understanding of what MCLINC does (6 points) What to know who do staff reach out to at MCLINC (3 points) • Want consistency of information (4points)
Committees:	• Make the meetings meaningful (9 points), Include training at meetings for CE credit (7 points) • Want more input on decisions (9 points), Want more autonomy (3 points) • Want procedures and guidelines for committees, and a way to preserve corporate knowledge (7 points)
Leap:	• Need training (9 points) • Need timeline (3 points) • *The catalog in general -* There are issues with functionality, i.e. search by material type (4 points), Want more customization (1 point), Want an overlay/discovery layer (4 points)
Training:	• On-demand training and regular training (6 points) • Everyone gets the same training (6 points) • Should be practical (6 points)
Uniformity/Act Like a System:	• Break down barriers among libraries to share information (11 points) • Want to know what MCLINC can offer for the Reference Committee (9 points)

Big Ideas for the Future:	• *Connect with the public* - Involve the public in the decision process (5 points), Library as a social space, with conversations (5 points), Engagement with the public, want stories, go beyond just providing books (4 points), Connections with the public (3 points)
	• *Some highly rated comments related to non-MCLINC activities*:
	  ○ Develop and expand staff (7 points)
	  ○ Social work or connection to a service (6 points)
	  ○ Improved physical facility, encourage small groups and interaction (5 points)

Focus Group - Children's

February 21, 2023

	Priorities
Communication:	• Document repository on a shared platform (13 points), Train staff on MCLINC (6 points) • Depends, don't need to know everything, sometimes get too many e-mails (5 points) • Like to have communication filtered through supervisor, they know who needs to know what (5 points)
Committees:	• Hybrid – allows more people to attend (10 points) • In-person, more opportunities to brainstorm (1 point) • Use shared docs to share ideas (1 point)

Leap:	• Need more information and training (13 points), Need training (6 points)
	• Only one window (13 points)
	• Want to know why we should use it (3 points)
	• *Catalog in general, see notes under standardization also*:
	  ○ Some filtering functions don't work, i.e. audience (17 points)
	  ○ Want more access points, i.e. Red Trucks (11 points)
	  ○ Want the "show any available now" button (5 points)
	  ○ Want a close enough spelling search (4 points)

Training:	• Standardized tools, how to train library staff in essentials (15 points) • Training curriculum with timeframe and follow-up (5 points) • Hands on (3 points) • Quick reference sheets (3 points)
Uniformity/Act Like a System:	• Catalog is difficult to use, Googlize it (15 points), Improve the catalog results, fewer bib records (9 points) • Consider the patrons (13 points) • Fines confuse patrons (5 points) • Length of check-out differs (3 points) • Label items clearly if they need special handling (3 points) • Where to draw the line? (3 points)
Big Ideas for the Future:	• List unique services in libraries (9 points) • Connect patrons with community resources (7 points) • PR for libraries (7 points) • More collaboration (3 points) • Diversity – connect with the community (3 points) • Permissions, need more flexibility (3 points) • Help adapting big ideas for small libraries, how to do it (2 points)

Focus Group - HQ Staff

February 22, 2023

	Priorities
Communication:	• Please use the ticketing system, not e-mail or text (4 points) • Libraries need to proactively send staff updates (4 points) • Not sure who to send it to (2 points) • Doesn't filter down (1 point) • "Rained-Out" style system/Pigeon (1 point)
Committees:	• Report back to directors (3 points) • Define roles and purpose, should they be District? (2 points) • *General heading* (1 point) • In-person, get better discussion (1 point)

Leap:	• Can use it anywhere (2 points)
	• Needs to be marketed (1 point)
	• No authority to make libraries use it (1 point)
	• *Catalog in general*:
	  ○ Need to agree on what it looks like (1 point)
	  ○ Polaris customer service is lacking (3 points)
	  ○ Needs to be easy to use (1 point)

Training:	• Regular training (4 points) • Difficult with local policies (2 points), Standardized (1 point) • Training manual (1 point) • Staff don't always follow trained processes (1 point)
Uniformity/Act Like a System:	• Want it, but don't do it (5 points) • Board should define HQ's authority (4 points) • Consequences for not following policies (4 points) • Need equipment and network standardization, all in Active Directory (3 points) • Required weeding – items and patrons (1 point)
Big Ideas for the Future:	• New ILS (6 points) • Keep abreast with new technology (4 points) • HQ staff more visible in libraries (3 points) • Centralized cataloging (2 points) • Add other libraries (1 point) • Merge with District (get county $) (1 point) • Rebrand (1 point)

Strengths:
- Collaborative
- Customers like access from home
- The catalog is a one-stop shop
- Patrons can place own holds
- Freedom from tech maintenance
- Sharing – access
- Governance
- Shared wisdom
- Independent and unified options
- Cost sharing/saving? Not uniform
- Transparency
- New training
- HQ customer service
- Ticketing system
- Staff
- Variety of libraries and staff
- Supportive culture
- HQ is responsive
- Better than it was
- Redundancy

Weaknesses:
- Money
- People don't understand MCLINC
- Communication
- Clarity of ticketing
- HQ staff, need more and longer hours
- History, for example Leap not rolled out effectively, "this is the way we've always done it"
- Lack of understanding on who has authority
- Lack of consequences
- Who needs the communication?
- Committees lack direction
- Manage staff fatalism
- HQ staff frustration/Library staff frustration
- We need to relax
- Decision flowchart
- Lack of why
- Lack of equal enforcement among libraries
- Favoritism
- HQ and libraries are reactive, not strategic enough
- Rumor mills
- Diverse libraries have different needs and priorities
- Lack of written documentation
- Unanimous vs. majority voting, confusing
- Lack of a menu of services and policies
- Clarity of roles
- Board and committees are too large, but need representation
- Confusion of leadership

Opportunities:

- Add remaining libraries
- More collaboration
- Committees
- Centralized cataloging
- RFID
- Training – modules
- Shared project management tools for upgrades
- Improve the user experience
- Communication
- Clarity
- Branding and marketing – tools to explain MCLINC
- Universal card
- New staff orientation
- Uniform job descriptions/standards
- Documentation
- ILS expert
- Libraries operate more cost effectively
- Menu of services and policies
- Resilience (we can support it)
- People need us
- Social media

Threats:
- Lack of stable funding
- Dues
- Lack of understanding of MCLINC – libraries and boards
- Future of the printed book
- Publishers and availability
- Technology advances, need to keep up to date
- Moms for Liberty – political climate
- Perception of libraries being obsolete
- Retaining and training staff
- Another pandemic
- Climate change
- Paid subscription services by patrons
- Generation wanting instant gratification
- People need us
- Social media

MCLINC Retreat, March 10, 2023
Identifying Themes

Summary of key themes

"Unicorn" Team	The Other Team
⭐ Foundational – by-laws, etc. What is it?	Foundational
⭐ Communication	Communication
Decision Making & Documentation	Training
⭐ End user experience – internal and external	User Experience
Wish List	Priorities for funding, menu of services
District/MCLINC Collaboration	

Notes from Team "Unicorn"

- 1 - Set a foundation of what we are
  - Bylaws
  - Member agreements
- 2 - Communicate
  - Positive
  - Thorough
  - Clear
- 3 - Charts
  - Organizational charts – why!
  - Decision making chart
  - Adapt CCS communication chard
- Documentation
- Marketing – internal and external
- Resiliency
- Defining customer – internal and external

- Menu of services
  - Centralized cataloging
  - RFID
  - Centralized MAC
  - Etc.
- Clarity of roles
  - Committees
  - Staff
  - Board
- Training
- 4 – End User Experience
  - Creating a seamless user experience
  - Access
  - Innovation
  - Collaboration
- 5 – Define ILS features
  - And what we pay
  - What are we using
- Standardized written policies
- Expanded MCLINC staff and hours
- Just. Be. Kind.
- 6 – District and MCLINC collaboration

Notes from Team Other

- Who should control the catalog?
- Training
  - Onboarding/Orientation
  - Clear Standards
  - Committees
    - Training
    - Process
    - Dissemination
- User Experience:
  - Evaluate the ILS
    - Open-source options?
    - Overlay?
  - Marketing and branding
  - Universal card
  - User experience is the end goal
  - Customer services
  - 16 + 4 = 1

- Communication
  - Decision flow chart communication
  - Clarification of roles
  - Handbook, documentation, orientation
  - Dissemination Procedure – in both directions
  - Respectful
- Foundational
  - Define and communicate goals
  - Define committee purposes
    - Success, Benchmarks
  - Get all staff on the same page
  - Set priorities
- Funding
  - Can we fund the central staff as needed?
  - Add other libraries?

MCLINC Strategic Plan

Draft 1 – Developed at the Board Retreat 3/10/2023

Goal 1: Foundational/What is MCLINC?
    Establish a clear understanding of what MCLINC does and how it operates
Objective 1.1 – Create a decision-making process.
Objective 1.2 – Define the purpose and expectations for committees, re-think structures.
Objective 1.3 – Document what MCLINC does and how it operates, include an organizational chart.
Objective 1.4 – Develop funding priorities.
Objective 1.5 – Develop a transparent and sustainable budget process.
Objective 1.6 – Update the organizational governance documents, including membership agreement, by-laws, core services. All libraries are on the same page.
Objective 1.7 – Analyze HQ staffing.
(should there be something here about new services?)

Goal 2: Communication
    Determine what MCLINC communicates-how, why, to whom, and from
            whom in a respectful manner.
Objective 2.1 – Create a marketing plan for both internal and external customers.
Objective 2.2 – Define clear communication channels that are easy to use.
Objective 2.3 – Clarify communication roles and responsibilities.
Objective 2.4 – Create a communication framework.
Objective 2.5 – Create channels to share decisions, such as a District/MCLINC newsletter, distribution lists, annual report, etc.
Objective 2.6 – Create a calendar of activities designating who is responsible (the word timeline was also used)
Objective 2.7 – Develop emergency communication procedures.
Objective 2.8 – Be kind.

Goal 3 – User Experience
    A seamless user experience is at the heart of what MCLINC does,
            for both the public and for library staff.
Objective 3.1 – Evaluate the ILS.
Objective 3.2 – Explore a universal library card.
Objective 3.3 – Explore a MCLINC app.
Objective 3.4 – Create a MCLINC brand and market MCLINC.
Objective 3.5 – Create a training program that is consistent, includes orientation, on-demand, with staff competencies.
Objective 3.6 – All libraries in the county become participants.
Objective 3.7 – Collaborate with the District on service, i.e. electronic resources.
Objective 3.8 – Support libraries to go fine free.
Objective 3.9 – Encourage standardized policies, procedures, and best practices.
Objective 3.10 – Be kind, every patron is your patron