To: Leslie Bednar

From: Nancy Bolt and Liz Bishoff

Date: May 14, 2015

Re: Summary results from the focus groups

As part of the Illinois Heartland Library System's strategic planning effort, five focus group sessions were held in March, 2015. The focus group included questions related to current and future IHLS services, as well as IHLS's mission, vision and value statements. Almost 55 representatives from IHLS member libraries attended one of the five sessions. Appendix A describes the methodology we used in conducting the focus groups.

The focus group discussion guide can be found in Attachment B. The questions that each group was ask included:

1. What do you like about current IHLS services?
2. What improvements would you like to see in IHLS Services? What new services would you like to see?
3. React to the draft Values Statement developed by the IHLS Board.
4. React to the draft Mission Statement developed by the IHLS Board.
5. ILHS has won an award (5 years in the future). What did it do to win the award? (Vision question)
6. What challenges to Illinois libraries face and how might ILHS address them?
7. What else did you come to say to us?

Looking at the responses across all five focus groups, the consultants identified eight overarching themes. Each of these themes is briefly described below, followed by a chart that shows the number of focus groups that mentioned them in response to questions 1, 2, and 5. These themes are not in priority order because the number of groups that made comments on any topic varied by the question asked.

- Resource sharing – there were mainly positive comments regarding the IHLS resource sharing activities with some suggestions for improvements in operation. The main concerns that were expressed were negative comments from non-SHARE members who feel isolated but unwilling or unable to join SHARE.
- Communication – there were numerous suggestions for improvements in IHLS communication, including in content, style, format, and frequency of communication.
- Customer service – there were mainly positive comments about the intentions of System staff to serve members. Comments for improvement tended to be centered in communication, consulting, and continuing education.
- Member engagement – the major issue addressed by many members deal with a feeling of isolation. They felt isolated by geography, type of library, and an inability to connect with other members. This isolation has developed since the merger of the systems, and, to some extent, blamed on the merger.
- Continuing education – There is a request for more CE on some topics. Format and frequency desired was not probed as part of these focus groups as IHLS has done recent research on this topic.

- Innovation – There is appreciation for innovation in the areas of e-Books and SHARE. Several members indicated that the system has not done anything new. There is a desire for still more innovation that might save money and serve users better.
- Consulting – Participants made frequent requests for re-institution of consulting for information and understanding of needs. Again this is an area that previous IHLS research has identified, so we did not probe too deeply.
- Advocacy – Most of the groups identified IHLS as the proposed leader in developing a library advocacy program that would advocate for the role of libraries and librarians at the local and state level. This would include member training, marketing materials and a marketing program.

Below is a comparison of the major issues identified in the four questions

Topic	**Like Now**	**Would change/New Services**	**Vision**
Resource Sharing, general	5/5	0/5	5/5
Resource Sharing, delivery	5/5	0/5	Not differentiated
Resource Sharing, SHARE	5/5	2/5 plus additional comments about Polaris	Not differentiated
Communication	4/5	4/5	2/5
Customer service	4/5	0/5	0/5
Member Engagement	1/5	4/5	4/5
Continuing Education	2/5	3/5	3/5
Innovation	1/5	0/5	2/5
Consulting	1/5	3/5	3/5
Advocacy	0/5	3/5	5/5

ANALYSIS OF CURRENT SERVICES AND POTENTIAL NEW SERVICES

Current services members like: The services are listed in the order of how many focus groups mentioned them, with comment as required.

Topic	**Responses**	**Comments**
Resource sharing, Delivery/ILL	5/5	Expands the collection, dependable & flexible. "Patrons are spoiled rotten."

Resource sharing, SHARE	5/5	SHARE—"Absolutely fabulous;" SHARE resource sharing seamless; having a shared catalog that Heartland maintains; training in cataloging—one of the best things about IHLS
Communication	4/5	Respondents commented favorably on the weekly newsletter—Moving Forward; Leslie's chat updating members on results of the Board meetings; topical chat forums that are archived; and various listserve. "Members are willing to share information, opinions, knowledge. I get good ideas that I can implement." Text updates on delivery has been well received.
Customer service	4/5	IHLS staff are approachable, easy to talk to. Tech support staff are responsive. "Customer service did not suffer when the system got larger." "IHLS is always looking out for members." IHLS is an "amazing value." System staff "care about libraries." One group suggested that IJLS "Use collective knowledge of library members to solve problems." "IHLS is always looking out for members." They "make an attempt to accommodate different types of libraries."
Cooperative purchasing	2/5	Members indicated an appreciation for the group purchasing of e-resources and databases, as well as discounts on supplies.
Continuing education	1/5	There was a positive response to Member Services Day from one group. The other group liked the online webinars.
Member engagement	1/5	This was a major issue in changes that System members wanted. One group mentioned that the liked the concept of hubs across the system.
Innovation	0/5	E-books—easy to use
Consulting		No group made positive comment about consulting

Improvements to current services: The services are listed in the order of how many focus groups mentioned them, with comment as required.

Topic	Responses	Comments
Consulting	5/5	All of the groups mentioned consulting in some way. Some simply wanted back what the legacy systems had provided consulting in the past. They wanted System staff that were familiar with each library and could give specific advice. A major theme was orientation and

		training for new library directors. There seemed to be general agreement that this group of librarians needed special attention and training. One group suggested sharing consulting services with RAILS. Participants wanted the System staff to be aware of their needs as a type of library and as individual libraries. They also asked for training on topics similar to those for CE: state mandates, legal issues, human resources; tech trends; and collection development. All acknowledged that funding for consulting services was not the same and, initially, consulting was not allowed by the State Library (whether this rule was changing was debated). However, when asked how IHLS could fund more consultants; what current services they might give up, there were few suggestions and no consensus.
Continuing Education	5/5	All of the groups suggested improvements in Continuing Education. Many of the suggestions were for topics on which they wanted to have CE webinars: human resources, legal advice, and state regulations for new library directors. Another theme was support for school librarians needing certification; for IHLS to get approval from the Illinois Department of Education to be an approved provider for school librarian certification courses. One group asked for a professional collection of materials for librarians and another asked for training to be done around the system.
Communication	4/5	IHLS has implemented a range of new technology to support communication across the system however major issues were identified. There was general agreement that communication with members needs to be completely revised, streamlined. “If you don’t participate in chat things get missed. Chats should be summarized, so you don’t have to go through the entire archived version.” “People miss out on information because it is put out on so many channels.” “There’s a problem with follow-through.” Information is incomplete, incorrect, and vague. “Website is out of date, hard to search.” “I can’t decide which website to search—IHLS vs. SHARE.” “I don’t know who the current board members are because old board members are still listed on the website.”

		"Academic libraries didn't realize they could take part in e-book service…Need to be clear up front who the email relates to." "Put information on website, give direct link to information on the website, not just in an email, it's difficult to find the information in emails." "There is too much information over too many channels. Hard to tell what's important that we should pay attention to." The Exchange listserv had a number of recommendations, including separating it into two listservs one for the exchange of items and creating a second list to discuss general issues. Participants also don't understand why IHLS staff members don't participate in the list when there are questions that they could answer. "If members are talking it should be monitored by the system." Participants recommended that all communication be reviewed for typos, grammar, etc. "Emails have a lot of typos, they have to be sent out multiple times because they are missing data, and it doesn't look professional too many mistakes." **NB: Consultants followed up with Leslie Bednar on the issue of typographic errors and grammar, she indicated a process has been implemented to address this matter**. There was also a call for more interaction with System staff. "We want systems staff to come to meetings and to discuss System Services." "More face-to-face where System staff explain things more thoroughly."
Member Engagement	**4/5**	Since the merger members have not had the opportunity for face to face meetings, there's a sense of isolation felt by many of the members. Various librarians a desire to meet with other System members in their area, from different types of libraries, with libraries of their own size, with members from across the system. This topic is being explored in the member survey. "[I] feel I'm in a 'dead zone', [I] feel disconnected, [I] feel isolated." They also expressed remorse at not connecting with colleagues from different types of libraries--"[we] feel disconnected from other members. No communication between types of libraries—'Find it painful and sad.'" "Public libraries and school libraries are more disconnected than before." Other comments: "More opportunity for networking where we don't

		need to drive two hours." "We need local networking." "We need the System to help us form local groups."
Advocacy	**3/5**	Respondents indicated that IHLS should develop an advocacy program as a means of aiding libraries in addressing the challenges they face today—funding, the role of libraries and librarians, school library certification, etc. Librarians also need training in how to advocate for funding, as well as advocating for libraries and librarians. "Develop an advocacy program to address usage, funding, and making libraries relevant and vital to the communities they serve."
Resource Sharing - SHARE	2/5	The Share program needs to be more open and transparent. SHARE participants looked to the individuals who are members of the SHARE leadership for all the answers. "People don't know how to get on SHARE committees, how long people serve, etc." There may be information on all this, but perception is all that matters. SHARE should be evaluated for central staff efficiencies. "Are SHARE staff excessive? Could we do with less?"
Customer Service	2/5	One said that services "now feel impersonal and feels distant." Most of that might relate to customer service are included in other categories in this chart, particularly communication.

There were other comments that don't fit into specific categories:

- SHARE/Polaris: There were a number of comments regarding SHARE/Polaris:
  - The recent introduction of LEAP tablet appears to be inconsistent. Some of the focus group participants were aware of the new capacity while others were not. They reported that new IHLS services/opportunities are introduced at chat sessions and if member libraries miss the chat session they may will either be unaware of the opportunity or have only a short time to respond.
  - SHARE technical support is inconsistent--"All IT/SHARE staff don't seem to have the same knowledge and training. If a person isn't available who knows the answer, no answer is provided."
  - "Circ support from SHARE staff should be required to work in a public library. SHARE circ staff specialists don't know anything in context with 'patrons in front of you.' Told by specialist to log-off all circ computers for 5 minutes."
  - When there are problems with the system, we "Need faster response to questions."
  - Several members raised the issue of invoicing for services—they need to arrive at a consistent time of year.
  - State Library Annual report—can the Polaris system create the annual state library reports?

  - Report of recommended Polaris changes, can it be organized in some way so it's easier to use?
  - Difficulty in following changes to cataloging rules—they are changed, then changed back; these changes are conveyed in email messages, which are hard to track.

- Cataloging Center:
  - Significant delays in Cataloging Center's cataloging of materials—easy 2 months

- Special Libraries: Participants from special libraries felt that they are "an afterthought." Members can borrow their resources, but special libraries receive fewer benefits from IHLS. There's no thought to their special needs."

Values, Mission, and Vision

We asked the focus groups to comment on the values statement and mission statement that the Board had developed as well as to help create a vision for IHLS. Below is an analysis of these discussions.

Values Statement

Each focus group was presented the following discussion question regarding the IHLS Values Statement.

> *IHLS is working on a set of values to guide their relationship with members and staff. At a recent Board meeting, the Board developed the following DRAFT Statements of Values. Please review these statements. Do you feel they reflect values that IHLS should use in interacting with members, staff, and other partners? What would you add or delete*

The Statement of Values as developed by the Board:

IHLS is committed to:

- *Supporting member libraries*
- *Leadership and teamwork*
- *Innovation and resource sharing*
- *Transparency and fiscal responsibility*
- *Clear and open communication with members, staff, and other stakeholders*
- *A service oriented and collaborative environment*
- *Advocating for quality library service*
- *Honor and integrity in all actions*

There was general agreement about most of the values expressed in the Values Statement. General comments included that the values will help to guide staff and that meeting the needs of members should be included somewhere. They also asked who the values were for and commented that there

was redundancy between the values and the mission. They felt if a statement was in the mission, it did not need to be in the values.

However, the groups were not comfortable with the format. The found the statements somewhat cryptic. They asked the meaning of the word leadership in the value and suggested that "resource sharing" is more appropriate in the Mission Statement than the Values Statement, as it now occurs in both.

The most comments were about "honor and integrity in all actions." There was general agreement that it was not needed. One person said "this sounds as if IHLS is reacting to some kind of past situation" that "honor and integrity is assumed, and should be obvious, well, duh." Others felt that transparency or fiscal responsibility covered honor and integrity.

The general consensus was to keep the concept of these values but format them in a clearer manner. The consultants will suggest a rewriting that addresses these comments in the final report.

Mission

The Mission has developed by the Board:

> *To provide quality library services for Illinois residents, IHLS serves multi-type libraries by developing partnerships, advocating for libraries, supporting access to shared resources, and promoting innovation.*

Again, there was agreement in the general concepts within the Mission statement. There were three main concerns. The first is that the first sentence gives the impression that IHLS serves Illinois residents directly. They would like that changed to make it clear that IHLS serves Illinois residents only through the member libraries. Second, they asked what "partnerships" meant and who are the partners? Are the member libraries partners or was IHLS thinking of non-library partners? Most felt that calling them "community partnerships" would make this clearer. Third, they suggested that the order of the phrases be revised to: 1) support access to shared resources; 2) advocate for libraries; 3) promoting innovation; and 4) community partnerships.

Vision

At its meeting the Board had developed the following mission statement:

> *IHLS empowers libraries to embrace innovation and collaboration.*

For the Mission and Values Statements, the drafts from the Board were shared with the Focus Groups. The Vision Statement developed by the Board was not shared rather the following question was asked:

It's five years from now and IHLS has won an ALA Award for the Best Multi-type Library Cooperative in the country. As this is publicized, what did IHLS accomplish or help members accomplish to receive the award?

The responses fell into several distinct categories. We have listed their comments below.

- Resource sharing and delivery – 5 groups
  - 100% of libraries have access to shared resources
  - Convinced state legislatures for library service to unserved areas
  - Seamless resource sharing for library patrons
  - Cost effective services, buying power to lower costs
  - Leveraged their resources to do together what libraries can't do by themselves
  - Affordable for rural libraries to participate
  - Polaris is viable and up-to-date, easy to use, continuously developed/innovative
  - Need a regional Polaris/SHARE user group
  - Single source of access for all e-content
  - Eliminated barriers such as pin # issues because System did all the purchasing
  - Negotiated statewide database contracts with lower price than a library alone
  - Redesigned courier to make sure libraries get books when have and need them

- Advocacy – 5 groups
  - Negotiated with the state library to get more money; advocate to the legislature for more funding
  - Cooperative effort between system, library, legislature, and public
  - Inspired libraries to collaborate to provide excellent service to users
  - Supported all sizes of libraries and budgets
  - Promoted E-books for us;
  - Promoted how great the library is
  - Brought library service to unserved
  - Helped all libraries engaged in important parts of community. Made us strong to give back to our communities

- Member engagement – 4 groups
  - Fair and equal representation of all libraries regardless of where they are – won't feel isolated
  - Promoted concept of networking and comradery among members
  - Coordinated members to reach consensus
  - Facilitated member libraries developing partnerships together
  - Public and school librarians have more interaction
  - Yearly members come together face to face to network and learn. Both type of library and cross library types

- Continuing education – 3 groups
    - Kept track of grant & training opportunities and sharing with members
    - Provided information on future trends
    - Partnered with local college for professional development at all levels – CE , certification, master degrees
    - Helped members stay current with technology – training and providing equipment
    - System provided training for users. System staff are available for libraries to "book" a staff member to come and do a training session for users at the library
    - System provided videos on U-Tube for people to learn how to use technology
    - CE materials that library directors can use with staff, particularly technology

- Consulting – 3 groups
    - Consultant services provided best and forward thinking libraries in the state
    - Hands on consulting
    - Created a personal relationship with every library

- Communication – 2 groups
    - Every member library well-informed and trained so comply with policies so result in well-functioning, sharing system
    - Effective communication to System members
    - Excellent in conveying communication; organizing information
    - Created monthly online video presentation explaining new opportunities and vital information with no fluff
    - Central communication to get the basics; can't read everything, create a central information band that's indexed well

- Innovation 2 groups
    - Innovative, looking beyond big vendors to find customized solutions to IHLS services
    - Sought outside funding to establish new innovative services
    - Members drive what's happening and libraries support it
    - "Looked for opportunities for innovation – so much going on in the world, in libraries, museums, we don't have time to keep up"
    - Innovative ways for member libraries to access services for users

Other

- Do everything on mission and vision promptly and cost effectively
- Balanced budget to reduce fees of member libraries
- Quality staff – all staff high quality
- Model for complete transparency
- Responded to needs of members
- Created a single system library card

- Reached out to members
- All schools in IHLS have a school library and certified school librarian
- Get books to kids that don't have libraries, unserved kids

Challenges

The next question asked was: *What challenges do Illinois libraries face and how might the multi-type regional systems help address them, either alone or in partnership?*

The challenges were similar to the discussion under the other questions. Five focus groups mentioned funding and promoting the value of the library's role in society and local communities. Three focus groups mentioned keeping up with technology and marketing the library. Two focus groups mentioned serving unserved populations, elimination of school library positions, building maintenance and space, library usage, staff workload, and being aware of innovations. Only one group mentioned delivery, resource sharing, broadband, digital divide, and continuing education.

What can the System do to help addresses these challenges? Four groups suggested that IHLS help with advocacy and marketing by developing a System wide program, training local libraries, providing, materials for local libraries to use, and conducting a media campaign. Two groups asked for more CE from IHLS, and one mentioned advocacy for additional funding and seeking grants.

What else?

The final question was "Is there anything you came to say that we didn't' ask you about?" This gave the group a chance to provide any concluding remarks. Comments received include:

- "We appreciate all that IHLS has been trying to do with limited staff and funds."
- "Don't assume what members want. Don't just listen to the squeaky wheel."
- "Schools don't fill out surveys because they don't believe anything will happen."
- "Special libraries are an 'afterthought.' We look good on the member list."
- "We need a systems headquarters at a central [geographic] site."
- "The northern part of the System feels like a 'poor stepchild.' The Director needs to be more visible in the north."

Attachment A:

Methodology

Five focus groups were held the week of March 9 through 13. One focus group was held each day. The chart below shows the date and location of the focus groups and the number of attendees at each site. The focus groups questions were developed in cooperation with IHLS staff and the group participants were sent the questions in advance (except for the first day). At the beginning of each focus group, the participants were told the purpose of the focus group (to gather information for a strategic plan) and asked to agree to a "process agreement" to guide the discussion. The process agreement include directions to listen to each other; share their own opinions; keep confidential what any other participant said; take care of their personal and information needs; and have fun.

Focus group	**Total # of participants**	**Academic librarians**	**Public Librarians**	**School Librarians**	**Special Librarians**
March 9, Granite City Six Mile Regional Library District	10		7	2	1
March 10, Salem Bryan-Bennett Public Library	8	1	5	3	
March 11, Marion Marion Carnegie Public Library	12	2	7	3	
March 12, Springfield Lincoln Library	11 – 3 unknown affiliation		4	1	3
March 13, Mahomet Mahomet Public Library	13 – 2 unknown affiliation		8	1	2
Totals	54	3	31	10	6

Attachment B:

Illinois Heartland Library System (IHLS)
Member Library Focus Group
Discussion Guide

Introductions, Purpose, Process Agreement, Methodology

Purpose: To obtain input from IHLS member libraries on:

- Perspective on the current and future IHLS services
- Values, mission and vision for IHLS

1. What do you like best about the current IHLS services?

2. What improvements would you like to see in IHLS service? Consider both improvements in current services or new services.

3. IHLS is working on a set of values to guide their relationship with members and staff. At a recent Board meeting, the Board developed the following DRAFT Statements of Values. Please review these statements. Do you feel they reflect values that IHLS should use in interacting with members, staff, and other partners? What would you add or delete?

   IHLS is committed to:
   - *Supporting member libraries*
   - *Leadership and teamwork*
   - *Innovation and resource sharing*
   - *Transparency and fiscal responsibility*
   - *Clear and open communication with members, staff, and other stakeholders*
   - *A service oriented and collaborative environment*
   - *Advocating for quality library service*
   - *Honor and integrity in all actions*

4. At the same meeting the Board also developed a DRAFT Mission for IHLS. Do you agree with this Mission Statement? How might you change it?

   To provide quality library services for Illinois residents, IHLS serves multi-type libraries by developing partnerships, advocating for libraries, supporting access to shared resources, and promoting innovation.

5. What is your vision for IHLS in the next five years?
   It's five years from now and IHLS has won an ALA Award for the Best Multi-type Library Cooperative in the country. As this is publicized, what did IHLS accomplish or help members accomplish to receive the award?

6. What challenges do Illinois libraries face and how might the multi-type regional systems help address them, either alone or in partnership?

7. Is there anything you came to say that we didn't ask you about?