

Regional Conversations 2014: A Report

Executive Summary

Background. In April and May 2014 SCRLC's Board of Trustees held a series of regional conversations stemming from SCRLC's staff vacancies and the need to develop the next plan of service for 2016-2021. The Board and executive director wanted to ensure that SCRLC would create positions and develop priorities responsive to member needs. Altogether, input was gathered from representatives of 25 SCRLC members: 13 academics, 2 school libraries/systems, 5 public libraries/systems, and 2 specials. The participants in the regional conversations considered six questions:

- What was an SCRLC activity where you felt the most engaged?
- What would members see and experience in a transformed SCRLC?
- What member-centered programming would you like to see?
- How can SCRLC enhance collaboration?
- What might SCRLC stop doing?
- Staffing: What kinds of positions can you imagine meeting your needs?

On June 6, 2014, a retreat was held at the Roberson Museum and Science Center in Binghamton to:

- Review the input collected during the regional conversations.
- Provide additional insight and ideas regarding those areas.
- Discuss further how SCRLC can be integral and the go-to organization for members.
- Discuss SCRLC's Regional Bibliographic and Data Bases Interlibrary Resource Sharing Program (RBDB).

The retreat brought together Board members and representatives from SCRLC's six Advisory Committees. Andrew Marietta, a regional manager of the New York Council of Nonprofits, Inc. (NYCON), facilitated the meeting.

This report combines the insights, comments, and recommendations from the members who participated in the regional meetings and those attending the retreat.

Key Insights and Recommendations.

Membership Enhancements.

- **Website.**
 - Make it easier to navigate; integrate more information from experts; ensure members can easily find how to participate in SCRLC and its programs and services; value and benefits information should be prominently featured and discoverable for current and prospective members.
- **Supporting Resources.**
 - Strengthen supporting resources including tutorials, templates, expert information available, archived recordings, forums, and listserv.
- **Membership.**
 - Define and clarify the levels and types of membership.
 - Examine and possibly rework the “report card” highlighting members’ contributions to SCRLC and benefits received from SCRLC.
 - Highlight or feature members and collections.
- **Staffing.**
 - Technology/digital services, member engagement, and education emerged as relevant SCRLC staff positions.
 - Staff should be visible.
 - Ensure the membership can easily find staff responsibilities and how SCRLC personnel can help them.
- **Committees.**
 - Assess committees, i.e., do we want several advisory committees, or would one committee with team/task force/user groups result in fewer silos?

Responses and Discussion Surrounding the Six Questions

What was an SCRLC activity where you felt the most engaged?

Participants in the regional conversations mentioned specific instances and programs, e.g. wellness and other webinars, recordings of programs, retreats, and workshops. Retreat participants echoed those components, e.g., the resource sharing retreat. Access to collections at no cost for interlibrary loan, databases, networking among libraries, in-person and virtual events were also seen as engaging members, with benefits associated with both formats. Engagement can happen either way, though face-to-face programming must be in the mix.

Some indicated that members get the most benefit when SCRLC addresses relevant issues at their point of need; therefore, SCRLC must be nimble and flexible to help all libraries. It was noted that with limited resources, SCRLC cannot do everything, which is where networking can play a role. The NY3Rs initiatives can also expand access to innovation and new services.

How to get more member engagement: SCRLC must get the word out to prospective members, as well as to existing members. Ensure that workshop participants are on SCRLC's listserv. Retreat participants would like to see SCRLC do a better job at separating SCRLC information from forwards on listservs.

What would members see and experience in a transformed SCRLC?

Regional groups indicated they wanted to see a more member-centered Council that provides unique services unavailable at neighboring 3Rs and to find a way to maximize resources. One of the participants asked about the role of a library consortium in an age where database vendors prefer working with an individual institution, while another thought that a benefit could be presenting a united front to some vendors. One felt OCLC would not be as strong of a presence in the future. Several participants believe that digitization is an area where consortia can play a role. Suggestions for transforming included:

- Experts' bureau providing consulting services.
- Trends forum focused on larger issues and technology.
- Exploration of issues, e.g. how to make library resources more attractive for instruction.
- Instructional and informational material available via a digital lab housed at SCRLC or mobile and available for loan.
- Technical expertise, education and training.
- Needs gaps are identified and assessed with the Council responding accordingly.

Additionally, retreat participants felt that a transformed SCRLC would include:

- Website: Relevant, navigable, and well-utilized. It includes more knowledge information. Prospective members, library workers new to the region, and others can easily find out how to get involved from the website. The website might be in-house (e.g. via WordPress). The forums associated with the website are engaging and thriving. They are used for best practices, special interests, and communities of practice. They are

permanently archived. There is a map with hover capability on the website to discover what libraries are in a given area and what they have. Additional suggestions offered:

- Social: Use the website and forums to get know each other better.
- Feature: Library of the month or week (website and via news).
- Highlight successes of SCRLC and its members via website, forums, and email/listservs. Include strengths, issues and challenges as relevant.
- Highlight staff contacts and areas of responsibility so that members know whom to contact.
- Knowledge base: Search engine on website (that would also search recorded events archive) with a regional focus featuring expertise.
- Include FAQs on various issues and topics.
- A directory that includes members' ILS, discovery services, databases, library professionals.
- "Just in time" topics are offered rapidly. Regional expertise is tapped into and utilized.
- SCRLC recognizes that other members have other affiliates and resources, and knows what is being done at other system levels.
- Advocacy
 - An engaged Committee/group whose activities include planning regional events (often in conjunction with other library systems), and recommends CE topics.
 - An advocacy plan.
- Membership
 - Membership and organizational types/individuals are clearly defined.
 - An equitable funding model is in place.
 - Benefits/value of membership are known and easy to find.
 - The impact of grants and projects is highlighted.
 - Annual report card for SCRLC is used as a return on investment tool (should revisit the report card (every member library director receives a card but few seem to share or distribute it to others)).
 - Strong messaging and PR is in place, especially on the website.
 - Advisory Committees/Special Interest Groups/Board/Task Groups: Prospective members know how to get involved.

What member-centered programming would you like to see?

Retreat participants expressed several ideas on member-centered programming, some iterating that our geography is a connection and that within a certain distance, SCRLC can provide certain elements; commonalities include history and climate.

Ideas expressed at the Regional meetings:

- Regional Opportunities: Conduct more visits to libraries "to see them in action and find out what struggles they experience," and support groups for libraries with similar issues. This could include forum discussions of issues and concerns.

- Collaboration: SCRLC should send constant reminders and encouragement about collaborative opportunities, both among similar types of libraries and across library type. The need for more collaboration between schools and other types of libraries was mentioned (note: the Teaching with Primary Sources is an example of this).
- Sharing: Swap & shop to share policies/surveys/successful grant applications/annual report templates and forms. Retreat participants felt this could add value to SCRLC—to make it easy for members to look at what others are doing.
- Member-centeredness could include crowdsourcing, e.g. use a CS platform for digitization like NYPL (<http://menus.nypl.org/about>)
- New York Heritage support continues to be needed and rethought for component public libraries. More focus on public library training and schools is needed. For planning, SCRLC's events should be announced further in advance.
- Conduct another database needs assessment.
- Profile member libraries and include their successes and challenges.
- The retreat participants also felt that challenges across library type, library positions could be a focus area. Technology and membership engagement are key connecting points for libraries—SCRLC has a role in facilitating this.
- Training and Education. Specific programming was mentioned, including special collections (digitized) of classroom relevance, creating opportunities for teens to make a difference in their communities, help in bringing isolated groups to the library, copyright, and project management. Additional caveats offered at the retreat:
 - SCRLC's recent Education and Training needs assessment survey had 150 responses.
 - Library workers may need more in-depth programs. The one-shot approach (e.g. standalone workshops) does not always meet their needs. SCRLC seeks ways to deepen and engage learning. This could include post-workshop components and additional types of certificates and digital badges.
 - SCRLC programs/workshops offer continuing education credits for public library re-certification—this should be advertised.
 - Minimal number of attendees are needed to hold workshops.
 - Continue to offer Lynda.com tutorials (though SCRLC should look at the two-week timeframe); create short tutorials and teach others how to do this. It was felt that some training also needed to be brief.
- Mentorship. This was discussed among Regional participants and the retreat. Mentorship is important for both existing and new librarians. There is much regional expertise, but mentorship is lacking somewhat. It also needs a focus and to formalize. Peer-to-peer connections are needed; Cornell's mentorship program is an example.
- Grants coordinator. This was discussed at the retreat, noting that the direction of grants should be thematic and take direction from the Committees and Board. Crowd-sourcing was mentioned as an example.

How can SCRLC Enhance Collaboration?

The Regional participants had many suggestions including:

- Facilitate communication on pressing issues.
- Hold regular round tables on hot topics. Although some might be held virtually, participants indicated that in-person SCRLC events are valuable ways to make networking connections.
- Use the forums to continue discussion on topics that may have started at a round table discussion or elsewhere.
- Develop S.L.U.S.H.-like events in other geographic regions, understanding that it can be difficult without the encouragement of one's organization; they need not involve alcohol.
- Facilitate open houses and tours of member libraries.
- Facilitate outreach from the "haves" to the "have nots" among libraries.
- One participant indicated that in their community, the public library has good relationships with the historical society, local private academic, hospital library, and for-profit academics (including student tours); another one said that school library systems and publics have a good relationship with other publics and do not need help from SCRLC.

Additionally, the retreat participants discussed:

- Meet with other systems.
- Get SCRLC's name and logo out there.
- Improve identity and connections.
- Measure success and develop some outcomes.

What might SCRLC stop doing?

- Regional participants suggested eliminating anything redundant, and that it was good that SCRLC monitors and participates in the NY3Rs initiatives to ensure they can benefit SCRLC members.
- The regional participants also suggested combining SCRLC committees and to re-evaluate their charges. The assessment of committees was also discussed at the retreat. Are six advisory committees needed?
 - Advisory committees serve at discretion of ED, who could change them.
 - Maybe broaden the definition- user group.
 - Would one committee with teams and task groups work better and be less "siloeed?"
 - Some 3Rs have only one advisory committee and user groups; others do not have any advisory committees and only have task groups.

Staffing: What kinds of positions can you imagine meeting your needs?

Two main areas of need emerged in the regional conversations and retreat: the need for technology (digital services, instructional designer; help with training/webinars); membership outreach. The theme of education and training threaded throughout the conversations and retreat. Visible persons are needed and the membership must know how the SCRLC staff can assist them. In the words of one participant:

“Technical background, interpersonal skills, PR, awareness, very energetic, consensus builder, continuing education experience – multiple formats. Someone able to see and make the connections between the multiple types of libraries. Able to see similarities and differences between the types of libraries.”

Additional suggestions included metadata credentials and web design experience. It was thought that specialized consultants can assist in other areas.

Specific Retreat Discussion Regarding the RBDB Program

- \$184,000 Budget (full funding level is \$219,386)
 - Largest of the program budgets (others are Hospital Library Services and Medical Information Services).
 - This is a real visible membership benefit to many members, especially for the smaller ones.
 - How can we :
 - Make the RBDB definition more flexible, more forward-thinking?
 - Help the State change the language and get involved in the change?
 - Approach NYS Library about revising guidelines?
 - Even “as is,” RBDB is the one budget allocation whose activities can be altered extensively (as opposed to the operational budget, Hospital Library Services, and Medical Information Services).
- **Member Grants Program**
 - Confusion about who can access it. Should SCRLC open grants more?
 - Revisit approach, e.g. use themes- like collaboration; specific digitization topics.
 - Include kickstarter funds.
 - If grants/kickstarters are expanded what do we give up? Databases? Staffing?
- **Consortium pricing**
 - Use RBDB to leverage with NY3Rs to get the best deals; e.g. special “Route 13” FirstSearch pricing; OVID.
 - Other 3Rs do cost sharing for members.
 - Do other 3Rs evaluate what others are buying?
 - Not necessarily recently.
 - Vendors- look at multiyear contract pricing.

- **Databases**

- SCRLC subscribes to three databases with RBDB funds: FirstSearch, Omnifile, and Literary Reference Center. Art Museum Image Gallery and Teacher Reference Center are provided free-of-charge as part of the EBSCO subscription.
 - Individual SCRLC members (regular) pay \$100; system member, \$500.
 - First Search is an issue because as of 7/1/14 not all academic libraries can access it through SCRLC's subscription.
 - EBSCO databases (Omnifile and Literary Reference Center) go to all libraries and are highly utilized.
 - What is good measurement of database use? Price per search? Other?
 - Must inform members of database decisions ASAP because they may have different contract periods.

- **Advisory Committee on Information Technology and Services (ACITS)**

- RBDB has always been the focus of the Committee.
 - Should the Committee broaden its scope? Meet with other committees?

- **Next Steps:**

- Board and ACITS will meet to discuss conversations and retreat results.
- The Personnel Committee will help with the job descriptions; new hires should be in place by the end of the calendar year.

Retreat Participants

Calida Barboza (Ithaca College, ACITS)
Linda Beins (Finger Lakes Library System, Board, Resource Sharing)
Lorie Brown (Southern Tier Library System, Resource Sharing)
Regan Brummagem (Corning Museum of Glass, Advocacy)
Diane Capalongo (SCRLC)
Lisabeth Chabot (Ithaca College, Board)
Kate Dimitrova (Alfred University, Board)
Jill Dixon (Binghamton University, Board)
Barbara Eden (Cornell University, Digitizing)
Richard Entlich (Cornell University, Board)
Deb Gagnon (Wells College, Board)
Nora Hardy (SCRLC)
Bernard Hogben (Ithaca College, Resource Sharing)
Jean Jenkins (Lourdes Hospital, HLSP)
Susan LeBlanc (DCMO BOCES, Board)
Sarah Maximiek (Binghamton University, E & T)
Mary-Carol Lindbloom (SCRLC)
Andrew Marietta (NYCON)
Aprille Nace (Corning Museum of Glass, Board)
Chuck O'Bryan (SUNY Oneonta, Board)
Al Oliveras (Southern Tier Library System, ACITS)
Mark Smith (NY College of Ceramics, Board)
Nicole Waskie-Laura, (BT BOCES, Board).

SCRLC's Advisory Committees:

- Awareness & Advocacy
- Digitizing Advisory (DAC)
- Education & Training (E & T)
- Hospital Library (HLSP)
- Information Technology (ACITS)
- Resource Sharing (RSAC)

Report created by Mary-Carol Lindbloom, September 2014 based the compilations from:

- Diane Capalongo
- Andrew Marietta
- SCRLC Board of Trustees