



Moving Forward – Summary Reports on Consulting and Development Services

February 2016

A. Plan of Service

1. Goal Statement: MHLS will provide services designed to meet the varying needs expressed by member libraries.
2. Intended Result(s): Member libraries will have access to assistance (including onsite visits) for:
 - a. Board development
 - b. Director development
 - c. Community-based planning, sustainable funding, growth and development
3. Evaluation Method(s):
 - a. Number and topic of consultations
 - b. Number of visits to libraries
 - c. Surveys to assess the impact of these services on director and trustee skills, behavior and knowledge
4. Annual Progress Report (2014):
 - a. The 2014 Survey of Library Directors rated MHLS Consulting & Development Services as being Highly Successful.
 - b. Responded to approximately 19,000¹ requests for assistance.
 - c. Made over 240² on-site visits to member libraries for consultation, information, program support, problem solving, technology support and training.

B. Outputs (2014)

1. Number of Consultations/Requests³ = 3,008 for 66 member libraries
 - a. Technical assistance in areas including:
 - i. Municipal and School District Ballot Initiatives⁴
 - ii. Public Vote Strategy
 - iii. NYS Property Tax Cap
 - iv. Open Meetings Law; use of executive session
 - v. Civil Service
 - vi. Oaths of Office
 - vii. Freedom of Information Law requests
 - viii. Non-profit Revitalization Act implications for public libraries and Friends Groups
 - ix. Charter amendments

¹ 19,000 is the estimated number of contacts in 2014 with member libraries on 'Consulting and Technical Assistance Services' as required by NYS in the System Annual Report. As per the instructions: This is the number of contacts (customers) relating to predetermined categories of System expertise; It includes contacts made between System staff of all **kinds** and the System's member libraries; Visits, e-mail, phone and written correspondence are all counted here.

² Total number of all MHLS staff on-site visits.

³ Number of Consultations/Requests represents the number of phone and email communications between member libraries and the MHLS Coordinator for Library Sustainability in a 12-month span in the areas of charter/registration; director development; Friends Groups; funding; organizational growth; personnel/management; planning; policies; Trustees; and some aspects of vote support.

⁴ For example, in 2014 the MHLS Coordinator for Library Sustainability assisted two libraries with their very first public votes, stabilizing their funding for the first time in each library's history.



- x. Registration for libraries that had converted from association to special district libraries
- xi. Meeting Minimum Standards for Public Libraries in New York State
- xii. Budget planning
- xiii. Conflicts of interest
- xiv. Bylaw revisions
- xv. Removal of a trustee
- b. Policy development assistance⁵
- c. Consultations on fiscal accountability/transparency
- d. Board president assistance
- e. Support for boards in hiring a new director
- f. Support for interim directors
- g. Friends Group support⁶
- h. Special District initiatives
- i. Consultation on personnel issues⁷
- j. Risk management assistance and disaster recovery support
2. Number of On-Site/In-Person Visits to Libraries = 97 for 36⁸
 - a. On-Site/In-Person Consultation topics/types:
 - i. Sustainable Funding Informational Sessions
 - ii. Campaign Strategy Consultations for successful public votes
 - iii. Long-range and strategic planning consultations⁹
 - iv. Facilitation of community focus groups
 - v. Mediation:
 - Between boards and directors
 - Amongst trustees
 - Between boards and municipal officials
 - vi. New director orientation and on-boarding¹⁰
 - vii. Director development sessions
 - viii. Planning and facilitation of board retreats

⁵ Between 2012-2014:

- 12% increase in the number of libraries who improved their internal financial controls
- 16% increase in the number of libraries addressing the confidentiality of patron records through policy
- 19% increase in the number of libraries with a Media/PR policy
- 22% increase in the number of libraries addressing workplace safety issues through policy
- 23% increase in the number of libraries that put a process in place to handle Freedom of Information Law (FOIL) requests

⁶ Friends Group Support topics such as: reporting requirements; tax issues; relationship with the director and board; recruitment strategies; and fundraising ideas

⁷ Consultation on personnel issues such as job descriptions; evaluation methodologies; and use of progressive discipline

⁸ In 2014

⁹ Between 2012-2014 there was a 27% increase in the number of libraries with a current long-range plan based on community input

¹⁰ 5 new directors in 2014



C. Outcomes

1. Library directors and trustees will increase skills and knowledge regarding Board development, director development, community-based planning, sustainable funding, and library growth and development.
2. Library directors and trustees will fulfill their roles and responsibilities to proactively meet the current and future challenges of ensuring library patrons are supported in their formal and informal educational endeavors through public library services.

D. Costs Associated with MHLS (2014)

MHLS STAFF	Percent Consulting & Development Services	Salary	Benefits	Consulting & Development Services TOTAL
Rebekkah	45%	29,857	11,431	41,288
				41,288
CONTRACTED SERVICES				Consulting & Development Services Cost
	Total Cost			0
TELCOM SERVICESⁱ				
Network & Phone Services ⁱⁱ	30,325 – 5,596 (Teleforms) =		24,729	870
				870
IT SERVICES				Consulting & Development Services Cost
Hardware ⁱⁱⁱ			9,083	319
Software ^{iv}			5,445	191
IT Supplies			2,213	78
				589
GENERAL OVERHEAD^v				Consulting & Development Services Cost
Supplies			5,732	202
Equipment Rental			16,472	579
Professional Fees			25,189	886
Postage	4,505- 2,875 (ILL) =		1,630	57
				1,724



FACILITIES OVERHEAD ^{vi}	Total Cost	Consulting & Development Services Cost
Staff/Benefits	51,696	1,818
Utilities	27,973	984
Custodial Supplies	1,736	61
Other Ops/Maint	35,776	1,258
Liability Insurance	15,423	542
		4,663
ADMINISTRATIVE SUPPORT ^{vii}	Total Cost	Consulting & Development Services Cost
Staff/Benefits	361,059	12,696
Professional Development	31,532	1,109
		13,804
<u>TOTAL</u>		62,938

E. Primary Funding Sources

1. State Aid - General
2. Member Assessment Fees

F. Value of Services

1. Number of Hours - Consultations/Requests = \$100,200
 - a. Number of consultations/requests (3,008) X time per consultations/requests (10 minutes) = 501 hours X \$200¹¹ = \$100,200
2. Number of On-Site/In-Person Visits to Libraries = \$102,375
 - a. On-Site/In-Person Visits (97) X \$1,125¹² = \$102,375

ⁱ % of total Telecom costs – After staff FTE assigned, breakout of telecom costs by service (break out Teleforms & all other by staff FTE per service)

ⁱⁱ Minus Teleform costs

ⁱⁱⁱ % of General Hardware/Software costs - After staff FTE assigned (allocate on a per staff calculation)

^{iv} OCLC charges to Cataloging Services

^v % of General Overhead costs - After staff FTE assigned (allocate on a per staff calculation)

^{vi} Ibid.

^{vii} Ibid.

¹¹ \$200 hourly rate is the average hourly rate of a library development consultant, based on conferring with three (3) consultants currently providing services to public libraries in New York

¹² \$1,125 is average cost of an in-person consultation with a library development consultant working in New York State including preparation and planning, travel, leading a 2 hour (minimum) on-site session, and follow-up including assessment