Montgomery County Public Libraries Performance Plan

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CountyStat Principles

- Require Data-Driven Performance
- Promote Strategic Governance
- Increase Government Transparency
- Foster a Culture of Accountability

Agenda

- Welcome and Introductions

- Impact of MCPL on Montgomery County

- MCPL At-A-Glance

- Hiring Freeze

- Organizational Chart

- Headline Measures

- MCPL Survey Results

- Wrap-up and Follow-up Items

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Contribution to Montgomery Results

- **A Responsive and Accountable County Government**
- Affordable Housing in an Inclusive Community
- An Effective and Efficient Transportation Network
- **Children Prepared to Live and Learn**
- Healthy and Sustainable Communities
- Safe Streets and Secure Neighborhoods
- A Strong and Vibrant Economy
- **Vital Living for all of Our Residents**

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Montgomery County Public Libraries At-A-Glance

What MCPL Does (for everyone)	How Much?
Provide a prompt, accurate, useful response to customer questions that help them with school, employment, leisure, citizenship and other important life activities. This service is provided in-person at our branches and virtually via our Ask-a-Librarian service (email, chat, and telephone). In cooperation with the State AskUsNow program, there is 24/7 reference coverage via on-line chat.	• 610,340 information questions answered in FY08 • 175.4 workyears (FY08, Less RIP) of State-certified librarians and library associates (40% of MCPL staff) • Open to the public 59,425 hours in FY08 (about 1,188 hours per week from 21 branches and one mobile services van). Branches open 40 – 64 hours per week. • Virtually open to the public 24/7, via content-rich and service-rich web-site; on-line/telephone renewal; and email, chat, and telephone reference (collaboration)
Provide physical and virtual information sources, professionally selected and maintained to meet both general and specific community needs, including: Pre-School Children, Children and Teenagers, Seniors, Visually Impaired Readers, Businesses, Language Learners, and World-language readers. This includes coordination of materials purchases with Public Schools, and a NACO Award-winning "Reader's Café" on-line newsletter.	• 3.47 million physical items (books, audio formats, video formats), circulated (checked out) 11.4 million times in FY08 • Growing e-book, e-audio, and streaming video content; and over 46 high-quality electronic reference sources searched almost 800,000 times in FY08 (Morningstar, Health Reference Center, Automotive Reference Center, Business and Company Resource Center, Academic databases, and more). • The most visited County Govt. web site, over 2 million visits in FY08 (pending confirmation). Actively managed, refreshed content, including "Kidsite," "Teensite," "Seniorsite," "Reader's Café" and "BizInfo." Includes community participation in website content and design.
Provide programming to support early literacy, children's school and reading needs, homework help, adult reading, culture, current events, community issues, English language learning, and other needs. This includes NACO award-winning programs for Children's Storytellers, English Conversation Clubs, and coordination of services for Seniors.	• Over 6,400 programs presented in FY08 • Over 1,500 English Conversation Club programs (NACO award-winner) • Over 1,900 pre-school programs, attended by more than 71,000 • Summer Reading program for 2008 had over 29,000 participants.

Montgomery County Public Libraries At-A-Glance

| What MCPL Does (for everyone)	How Much
Provide a vital community space that fills a diverse set of group and individual needs, from tutoring-studying to recreational reading. Provide several heavily used public meeting spaces through the Community Use of Public Facilities program and provision of computer workstations to facilitate e-government transactions and other needs.	• 21 branches, 444,000 square feet available in FY07, up from 375,000 in prior years. • $120 million Capital Program (FY07-14) • 472 Public Access Internet Computers loaded with office productivity software (Microsoft Word, Excel, and PowerPoint) and Internet access. • 5 Computer/Language Labs with English and other language learning software (also resources for extended resume development, homework, disability-specific equipment, and other needs) • 29 Meeting Rooms, used approximately 25,000 hours per year. • Tutoring, quiet study, and group study rooms in almost every library branch. • Literacy Council teaches more than 800 persons per year how to read and write, using MCPL space and receiving about ½ their funding from the County.
Overall	• Operating Budget (FY09): $40.4 million (RIP Target: $39.5 million) • Personnel Complement: 470 positions; 420.9 WYs • More than 600,000 registered card holders • More than 9 million visits in FY08 • 88% of surveyed users visit library at least monthly • Per capita spending of $40, near the national average for similar systems

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Hiring Freeze

MCPL Frozen Positions as of 9/26/08

- Currently approximately 9% of positions in the department are vacant (44 vacancies, 33.8 WYs)

- 10 positions (8.5 WYs) in active recruitment

- Under terms of blanket hiring freeze exemption (dependent upon meeting $900k reduction in personnel budget from RIP)

    - 34 Positions Frozen, 25.3 Workyears as of 9/26/08
        - MCPL projects filling 13 positions (12.8 WYs), mostly in January 2008 (to stay at RIP target PC Budget).
        - In order to stay at the RIP budget target, the approximately 21 positions (12.5 WYs) remaining are projected to remain vacant for the entire year, with some additional positions probably going vacant each month (last FY, approximately 4 people left the system each month).

- Retirement Incentive Program (21 people in MCPL retired on July 1, permanent loss of 11 positions, 5.5 WYs) produced a large increase in vacancies

Hiring Freeze : Recent Trends
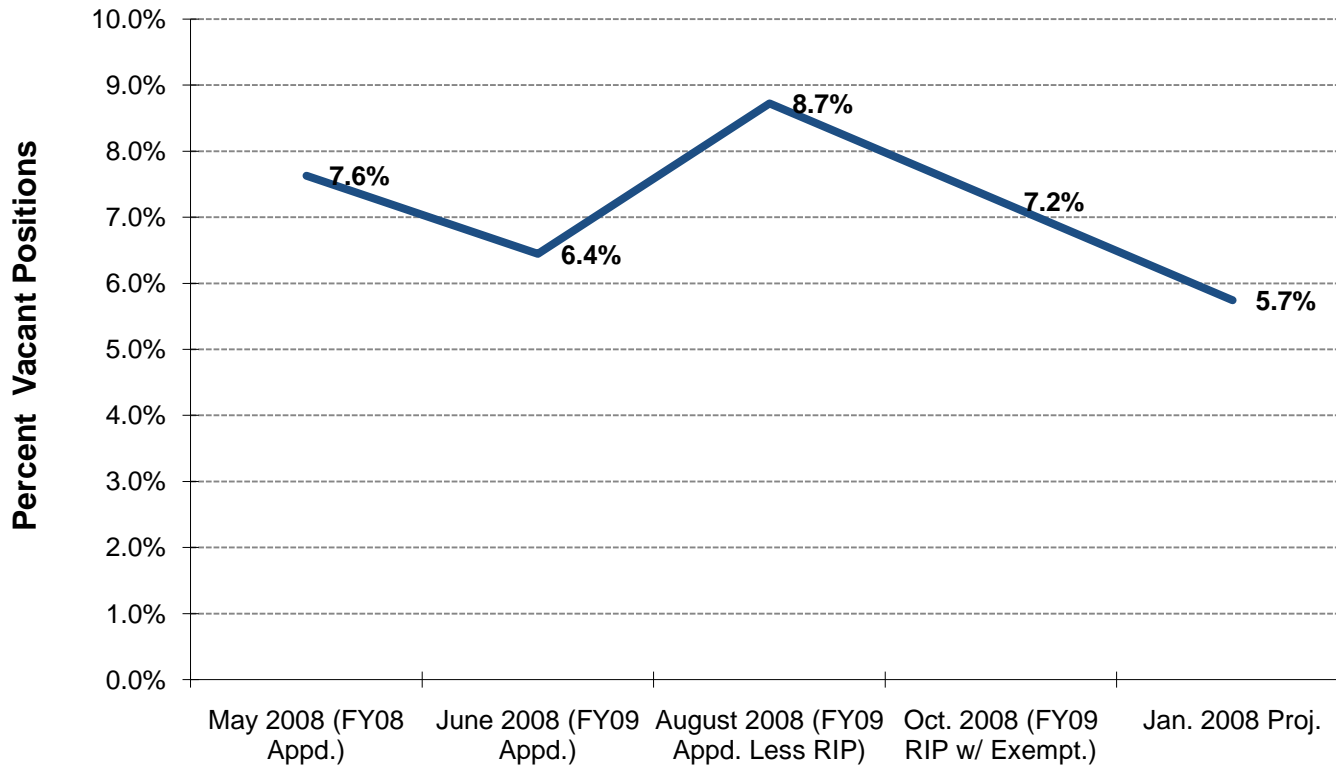
A normal rate of vacant positions due to standard turnover conditions would be a rotating 20 – 25 positions, between 3 and 4% of positions. MCPL is currently much higher than that level, and many of the positions that are vacant are long-standing due to the hiring freeze.

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Hiring Freeze Effects

- Implementation of Strategic Plan Substantially Slowed – Esp. Improving Virtual Services, better and more uniform support of branches I.T. (both diagnosing systemic issues and providing customer service)

- Scheduling enough staff at services desks is very challenging, especially with diminished substitute staffing budget and less personnel cost flexibility

- Scheduling reduces ability to do system wide work (branch staff can't attend/assist as often as needed)

- Critical staffing shortages can develop due to illness and resignations; probability increasing that system assistance may not be adequate or timely to avoid service disruptions when this happens.

- Reducing services to residents, including programming and outreach.

- Limiting an increased presence by MCPL in key County initiatives: 311, Positive Youth Development, Senior's Initiative, Transform MCG.

Hiring Freeze: Mitigation Efforts

- Blanket exemption (with budget limitation parameters) negotiated to allow flexibility to hire as needs/challenges change and reduce process work on all parties

- Personnel costs highly monitored and detailed plan for hiring positions in a priority order within budget parameters developed and implemented

- Restructuring of branch leadership structure and staffing complements to more efficiently manage and balance workload throughout the system

- Conducted a workload study and made temporary and permanent transfers to better balance staffing based on analysis of workload and recent changes caused by RIP, hiring freeze, and other forces

- Changes in processes made where possible to increase efficiency and improve public service (e.g., changed how we process best sellers to reduce staff work, increase availability of titles to the public, and get materials into branches more quickly via direct-shipping of those items to branches)

MCPL Organizational Chart
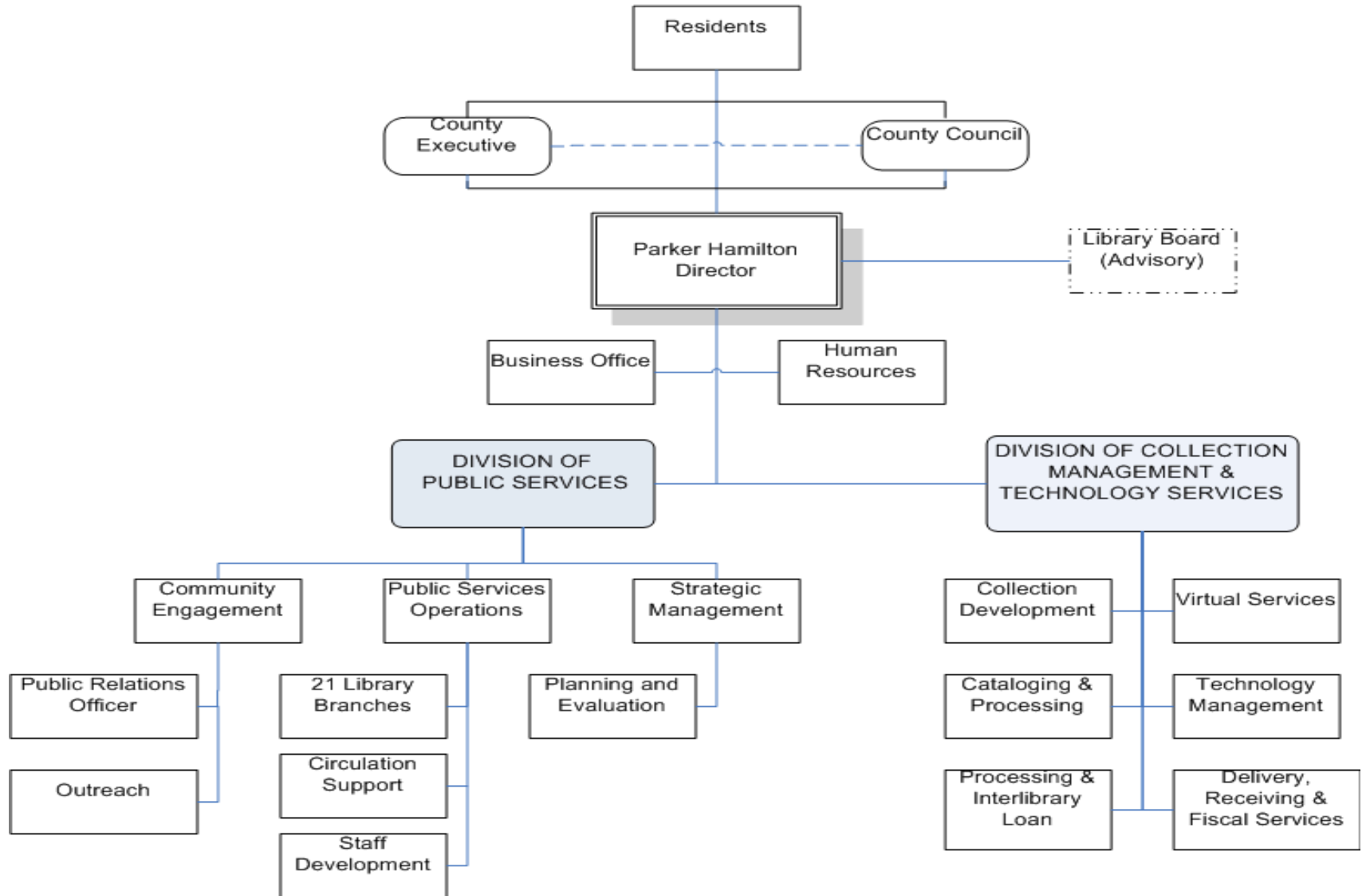
Headline Measures

1. **Circulation Per Capita**

2. **Visits Per Capita**

3. **Percentage Share of Material Expenditures**

4. **Customer Satisfaction** *(under construction)*
   Programs and Services
   Collections and Materials
   Building Amenities
   Customer Service
   Technology

5. **Impact of Library Services On Community** *(under construction)*
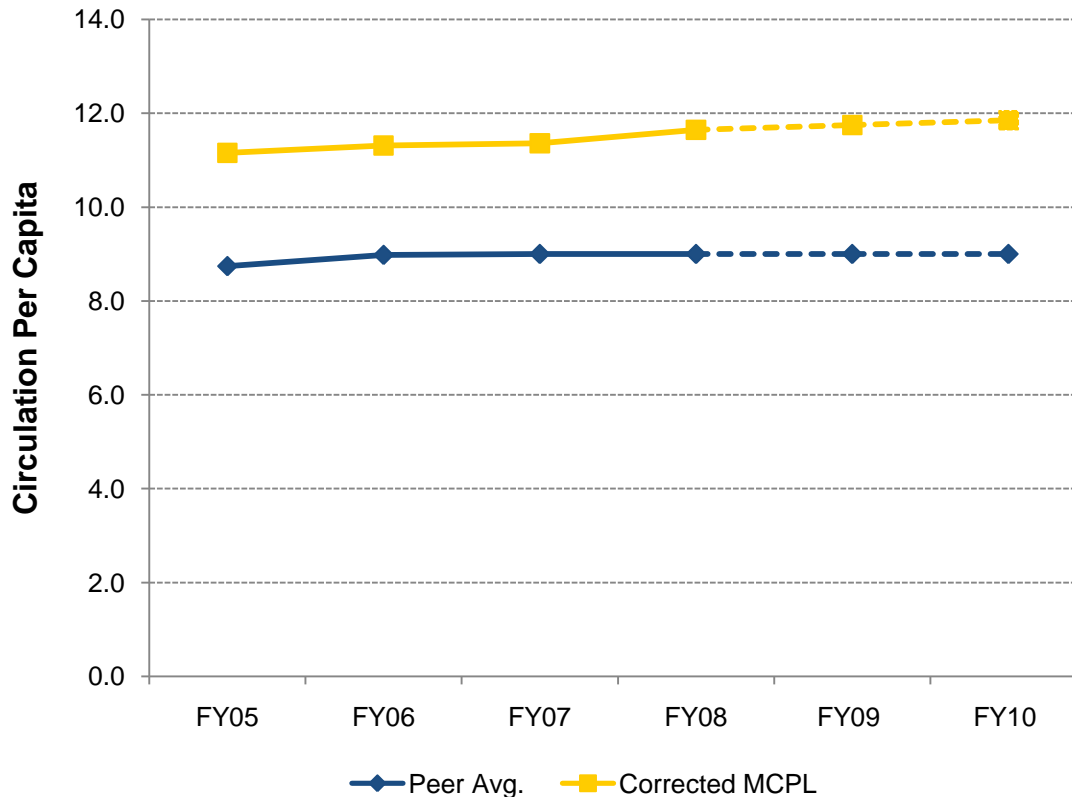
Comparison of Headline Measures to MCPL Functions

	Measure #				
	1	2	3	4	5
Provide a prompt, accurate, useful response to customer questions				X	X
Provide physical and virtual information sources	X	X	X	X	X
Provide programming		X		X	X
Provide a vital community space		X		X	X

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Headline Measure 1: Circulation Per Capita

	Total Circulation
FY05	10,506,528
FY06	10,792,038
FY07	10,970,744
FY08	11,390,866
FY09	11,618,683
FY10	11,851,057

Measuring circulation is an important indicator of library performance because it shows generally if the materials selected are relevant to the community, and it can also be compared to peer library systems.

Source: Public Library Association PLDS Survey 65 Libraries serving 500,000 - 999,999 residents, FY05, FY06, FY07 actual data

Headline Measure 1: Circulation Per Capita Benchmark and Performance Expectations

What constitutes good performance for this measure?

- Circulation per capita should increase over time

Contributing Factors

- Adequate materials collection budget
- Materials selected meet customer needs
- Marketing of materials to customers
- Good information service (to suggest right materials to meet customer needs)
- Efficient processing and delivery of materials
- Good computer system (helps customers find materials easily)
- Efficient customer holds process

Restricting Factors

- Staffing and equipment issues that delay materials processing or delivery
- Level of materials collection budget (currently OK), inflation
- Increasing diversity of needs and formats can outstrip existing resources
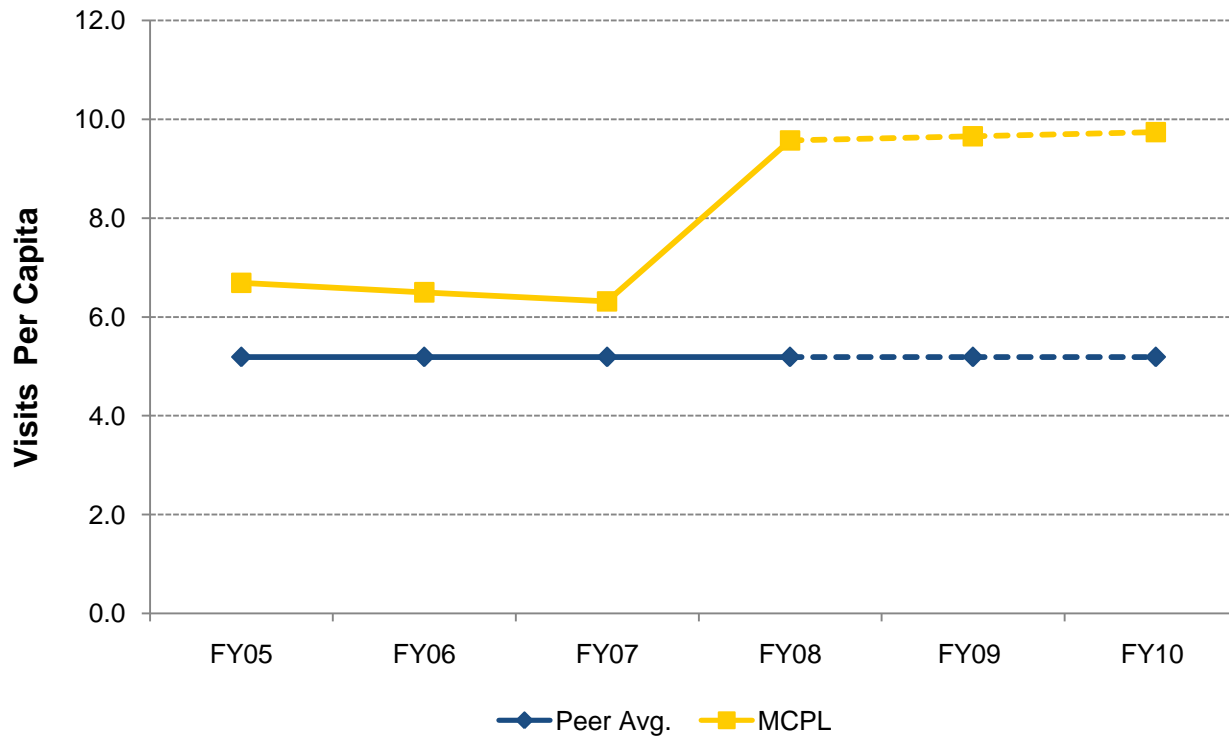- Lack of consensus on how to present electronic content usage

FY06 Circulation Per Capita in Benchmark
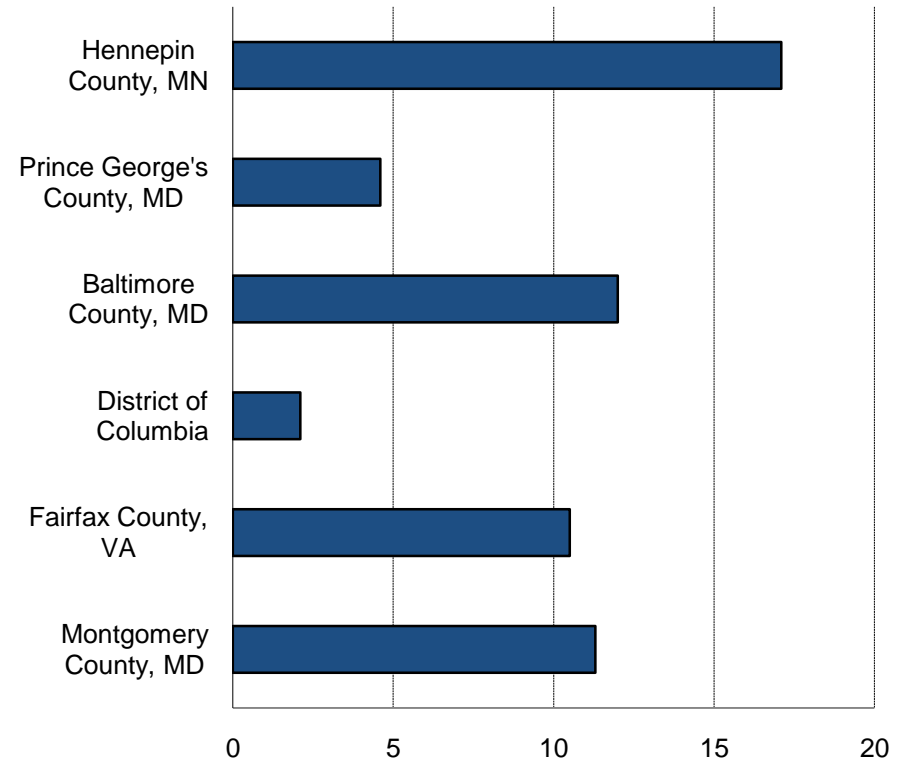
MCPL will continually monitor internal circulation per capita and benchmark this performance against like jurisdictions in an effort to increase circulation.

Headline Measure 2: Visits Per Capita

The increase in FY07 to FY08 visits per capita is the result of a correction to a long-standing formula error that was undercounting visits to the library.

Measuring visitor rate is an important indicator of library performance because it shows general public use of the library facilities (for more than just checking out books), and can be compared with peer systems.

Headline Measure 2: Visits Per Capita Benchmark and Performance Expectations

What constitutes good performance for this measure?

- Visits per capita should increase over time

Contributing Factors

- Convenient hours of operation
- Size, quality, attractiveness, utility of branches
- Community need for knowledge, gathering
- Programming, marketing, collection

Restricting Factors

- Hours not matching full diversity of community need
- Size, quality, attractiveness, utility of branches
- Cost to renovate facilities, staff new ones
- Length of time to build/renovate
- Transportation/parking

FY06 Visits Per Capita Benchmark
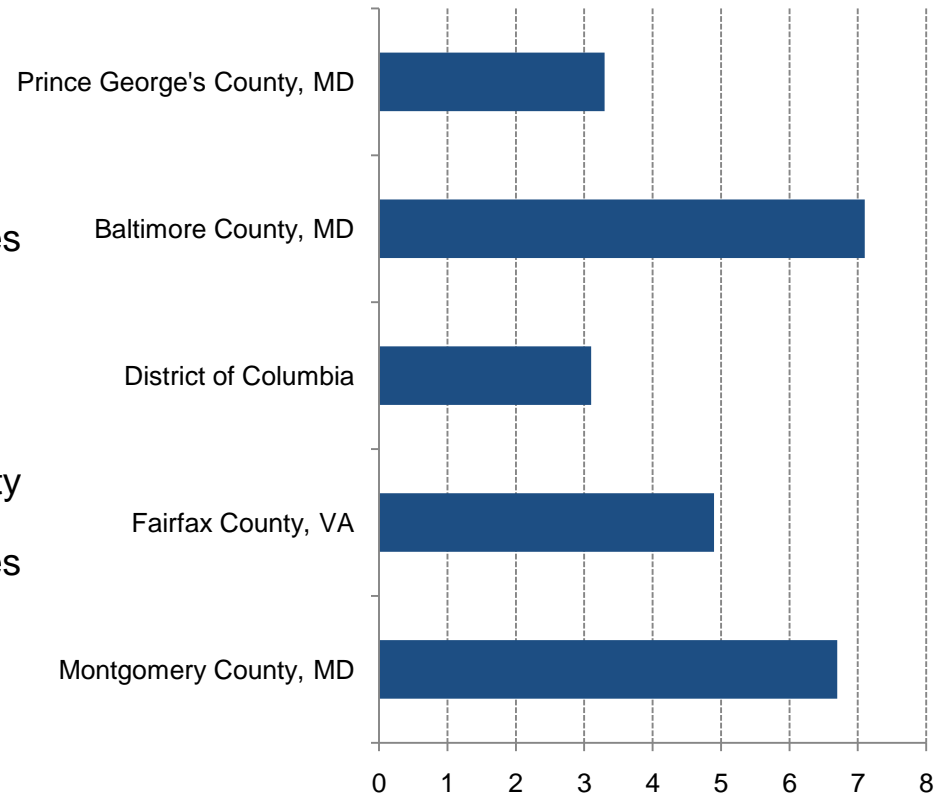
MCPL will continually monitor internal visits per capita and benchmark this performance against like jurisdictions in an effort to increase library usage.

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Headline Measure 3: Percentage of Material Expenditure

Comparison of Collection Expenditures as a Percentage of Total Operating Expenditures
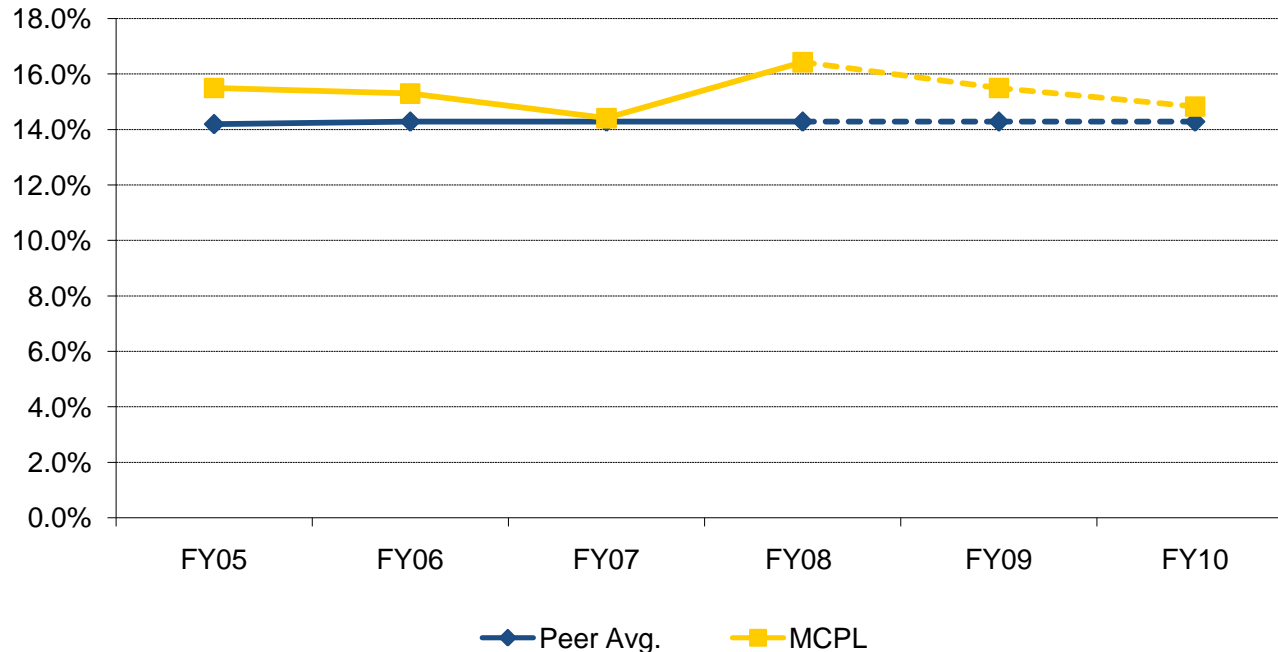
Measuring collection expenditures is an important indicator of library performance because it is a nationally used comparison of a library system's quality of service in this key area.

Headline Measure 3: Percentage of Material Expenditure Benchmark and Performance Expectations

What constitutes good performance for this measure?

- Percentages of materials expenditures should compare favorably with national and regional peers

Contributing Factors

- Consistent recognition and support for a stable materials budget
- Balanced selection of materials
- Efficient purchasing regulations and operations
- Materials selected meet customer needs

Restricting Factors

- Growth in staff costs without subsequent increase in materials budget (tends to bring the ratio down)
- Large cuts to materials budget in lean budget years (has downstream effects)
- Failure to keep up with inflation
- Growing diversity in customers' needs can spread existing funding too thin

FY06 Material Expenditures Benchmark

Jurisdiction	Percentage
Hennepin County, MN	14.8%
Prince George's County, MD	16.6%
Baltimore County, MD	19.0%
District of Columbia	12.2%
Fairfax County, VA	24.2%
Montgomery County, MD	15.3%

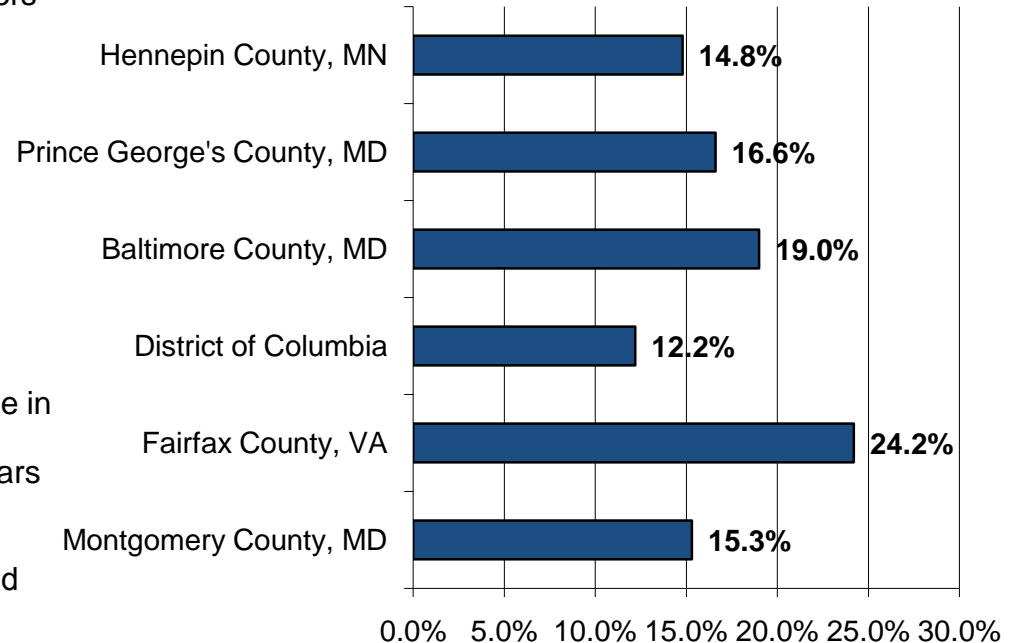*(Horizontal bar chart with x-axis: 0.0% 5.0% 10.0% 15.0% 20.0% 25.0% 30.0%)*

MCPL will continually monitor internal material expenditures and benchmark this performance against like jurisdictions in an effort to increase library usage.

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MCPL Customer Service Survey

- The Montgomery County Public Libraries conducted a survey of library users in April 2008 to determine customer satisfaction and to identify opportunities for improvements in library services.

- 8,036 people responded to the survey

- CountyStat has analyzed the results of that survey in three ways: system-wide results, results by branch, and results by demographic group.

- Respondents rated MCPL well both in terms of overall satisfaction and in each of the twenty-five service categories identified in the survey.

- The average overall satisfaction rating was 1.37 on a 5-point scale (1 was highest), and the average service category satisfaction was 7.39 on a 9-point scale (9 was highest).

CountyStat Analysis of MCPL Survey Data
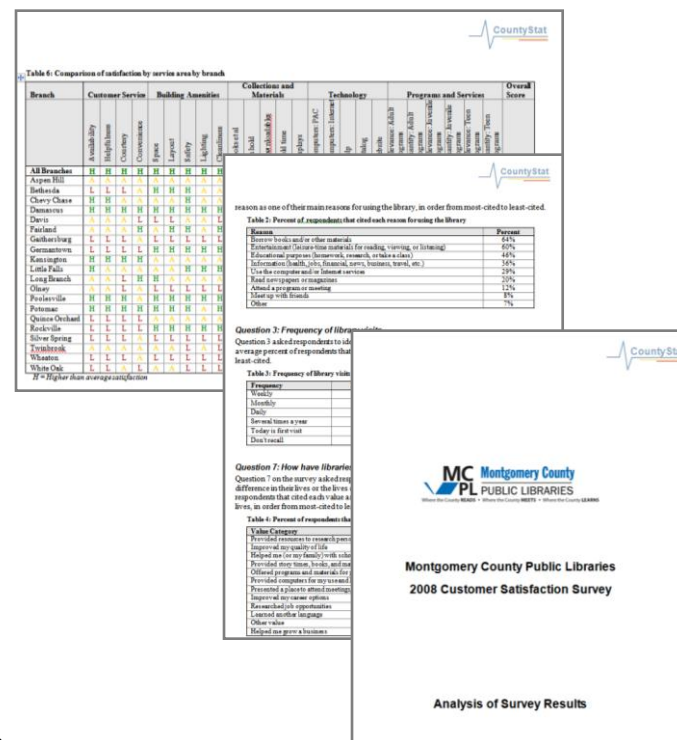
The MCPL survey serves as a baseline for the creation and monitoring of customer service headline measures

MCPL Survey Analysis Methodology

- Notes About Survey Methodology
  - There were only 29 respondents from the Noyes branch, far fewer than the 200-600 responses from other branches. Results for Noyes therefore are not reported here.

  - Because of the sampling methodology employed for this survey, the analysis uses results at the branch level as the basis for comparisons.

  - All system-wide results reported here and used for comparisons are calculated as the average of branch results.

  - All branch-specific results are measured through comparison of the average results for all branches.

$$\frac{\textbf{Individual Branch}}{\textbf{Average of All Branches}} = \textbf{Comparative Branch Results}$$

MCPL: Snapshot of High-Level Findings

- **Five Highest Predictors of Overall Satisfaction:**

  - Customer Service: Availability (availability of staff when assistance is needed)
  - Customer Service: Courtesy (staff courtesy and approachability)
  - Collections and Materials: Books et al (satisfaction with books, magazines, audio books, CDs, videos/DVDs)
  - Collections and Materials: On hold (satisfaction with the availability of books, magazines, audio books, videos/DVDs that can be borrowed or placed on hold)
  - Technology: Computers: Internet (availability of computers to access the Internet)

- **Top Reasons for Attending Library:**

Reason	Percent
Borrow books and/or other materials	64%
Entertainment (leisure-time materials for reading, viewing, or listening)	60%
Educational purposes (homework, research, or take a class)	46%
Information (health, jobs, financial, news, business, travel, etc.)	36%
Use the computer and/or Internet services	29%
Read newspapers or magazines	20%
Attend a program or meeting	12%
Meet up with friends	8%
Other	7%

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MCPL: Initial Conclusions From Survey

- Customer satisfaction is generally high, overall satisfaction is largely highly satisfied or satisfied, specific satisfaction with aspects of service mostly averages 7 – 9 on a 1 – 9 scale (where 9 = extremely satisfied)

- There are variations in satisfaction by age group and branch that will be reviewed to improve MCPL services

- Physical Library materials (books, DVDs, CDs, audio books, magazines, etc.) are still the primary purpose people use library services and the most cited benefit.

- Satisfaction with help for computers and the web-site is lower than satisfaction with other library service elements.

- Satisfaction with programming is lower overall than other library service elements, but younger age groups tend to be more satisfied with programming than older age groups.

MCPL: Initial Conclusions From Survey

- Younger age groups (0 – 34) tend to be less satisfied with the availability, helpfulness, courtesy, and convenience of library staff services than older groups.

- In general there are higher levels of satisfaction with customer service and building amenities, average satisfaction with the materials collection, and lower than average satisfaction with the website, technology help, and library programs.
    - These results vary substantially by age group, branches, and in some cases ethnic groups.

- Aside from Library Materials, another predictor of customer satisfaction was the availability of Internet computers.

- There was a direct correlation between high satisfaction and the library customers indicating library services made a difference in their life in more than one way.

- Recently renovated or replaced libraries received higher than average scores for building amenities.

- Most of the libraries awaiting renovation in the CIP received lower than average scores for the same.

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Headline Measure 4: Customer Service: Baseline Data

| Satisfaction Level	Rating	Service Category
Higher Than Average Satisfaction	8.21	Customer Service: Helpfulness
	8.19	Customer Service: Courtesy
	8.08	Building Amenities: Cleanliness
	8.06	Customer Service: Availability
	8.00	Building Amenities: Lighting
	7.93	Building Amenities: Safety
	7.70	Building Amenities: Layout
	7.62	Customer Service: Convenience (of local branch's hours)
	7.59	Building Amenities: Space
	7.57	Collections and Materials: Displays
	7.52	Collections and Materials: On hold
Average Satisfaction*	7.45	Collections and Materials: Books et al
	7.37	Technology: Catalog
	7.36	Technology: Computers: PAC
Lower Than Average Satisfaction	7.35	Collections and Materials: Hold time
	7.34	Technology: Website (Ease of finding information on web site)
	7.24	Technology: Help (Availability of Staff to help with computer questions)
	7.13	Technology: Computers: Internet (availability)
	6.96	Programs and Services: Relevance: Juvenile programs
	6.92	Collections and Materials: Downloadables
	6.87	Programs and Services: Quantity: Juvenile programs
	6.71	Programs and Services: Relevance: Adult programs
	6.61	Programs and Services: Quantity: Adult programs
	6.53	Programs and Services: Relevance: Teen programs
	6.51	Programs and Services: Quantity: Teen programs

Difference between the service category rating and the average rating was not statistically significant.

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Headline Measure 4: Overall Service Quality

- 2008 Survey results on overall satisfaction serve as a baseline for the future development of targets
- These targets will be monitored over time to demonstrate changes in overall library performance
- Supporting measures will report on each of the individual aspects of overall service quality

2008 Survey: Overall Satisfaction with Library Services
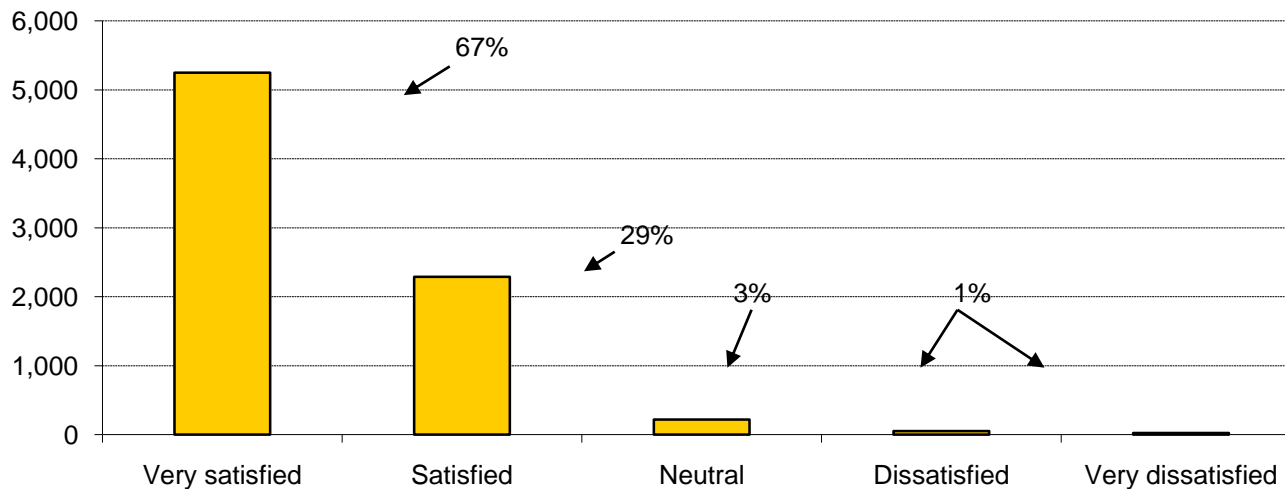
Headline Measures: 5 – Baseline Data

Baseline Impact of Library Services as Indicated by Customers (April 2008)

Impact of Service	Percentage of Respondents Indicated
Provided resources to research personal information (health, finances, purchases, retirement, travel, etc.)	44.6%
Improved my quality of life	42.7%
Helped me (or my family) with school assignments and projects	41.4%
Provided story times, books, and materials for my children	36.9%
Offered programs and materials for personal growth and entertainment	31.6%
Provided computers for my use and learning	28.9%
Presented a place to have meetings, relax, socialize, and have fun	20.0%
Improved my career options (career research, learned new skills, etc.)	19.6%
Researched job opportunities	16.8%
Learned another language	10.5%
Other	5.7%
Helped me grow a business	5.0%

MCPL will use ongoing survey data on the library's impact on its customer base to measure the overall effectiveness of the system.

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MCPL Select Action Items from Survey

1) Improve existing staff capability/knowledge of computers and related infrastructure that serves customers (hiring freeze and budget impacting this)

2) Increase IT specific staffing to serve customers, and better maintain and diagnose IT issues in branches (hiring freeze and budget impacting this)

3) Improve IT infrastructure to work more efficiently (hiring freeze and budget impacting this)

4) Improve programming, including what programming is done, how it is done, and how staff are trained/evaluated. (hiring freeze and budget impacting this)

   1) Especially need to improve programming for adults, particularly seniors (survey sub-results supported this conclusion), while maintaining excellent children's and teen programming.

   > Of the service aspects that had lower than the average ratings, many validated current work MCPL promotes in its strategic plan.

MCPL Select Action Items from Survey

5) Update website to improve navigation and content, increase coordination with DTS, improve the ability for customers to quickly and efficiently find both physical and electronic materials that best meet their information needs

6) Improve selection of materials, delivery processes, processing techniques, and the "Holds Process" to get materials more quickly to the customer, improve the relevance and availability of items on each branch shelf, and thereby reduce the need for customers to request items on hold

7) Improve the selection, marketing, staff training, and customer training of electronic reference materials, downloadable content, and other virtual services offerings; particular focus on ensuring that relevant virtual services are offered to all age groups in the County

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Wrap-Up and Follow-Up Items

Follow-Up Meeting

Performance Plan Updating

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