NC CARDINAL

5th ANNUAL MEETING | July 28, 2017

1

Welcome!

Agenda

FY 2016-2017 Year In Review

Committee & Working Group Updates

- Introduce New Committee Members
- Cataloging Committee
- Resource Sharing Committee
- Authorities Working Group

Consolidation Project Update

Governance Committee Voting Logistics

Lunch & Governance Committee Vote

ProQuest Summon Discovery Layer

Student*Access* Program

Public Library Stats for NC Cardinal

Annual Survey Results

Announce New Governance Committee Members

FY 2017-2018 & The Way Forward

Questions and Discussion

Transition....

Personnel

Benjamin Murphy Catherine Prince

Partnerships

Student*Access*Candid Critters

Projects

Consolidation Authorities Training

Assessment

Environmental Organizational

Personnel

- Benjamin Murphy
- Catherine Prince

Projects

- Consolidation
- Authorities
- Training & Certification

Partnerships

- Student*Access*
- Candid Critters
- Migrations

Student Access

Goals

- Access to statewide online library resources across consortium
- Access to locally-purchased online research databases, e-materials, specifically e-books and e-audiobooks
- Ability to check out books, both print and audio

Participants

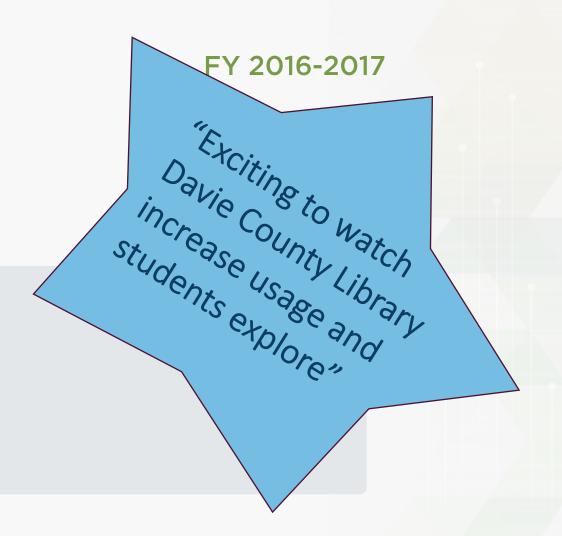
Davie, Davidson, Farmville, Iredell

New Policy

Patron barcodes must be 12 or more in length.

Partnerships

- Student*Access*
- Candid Critters

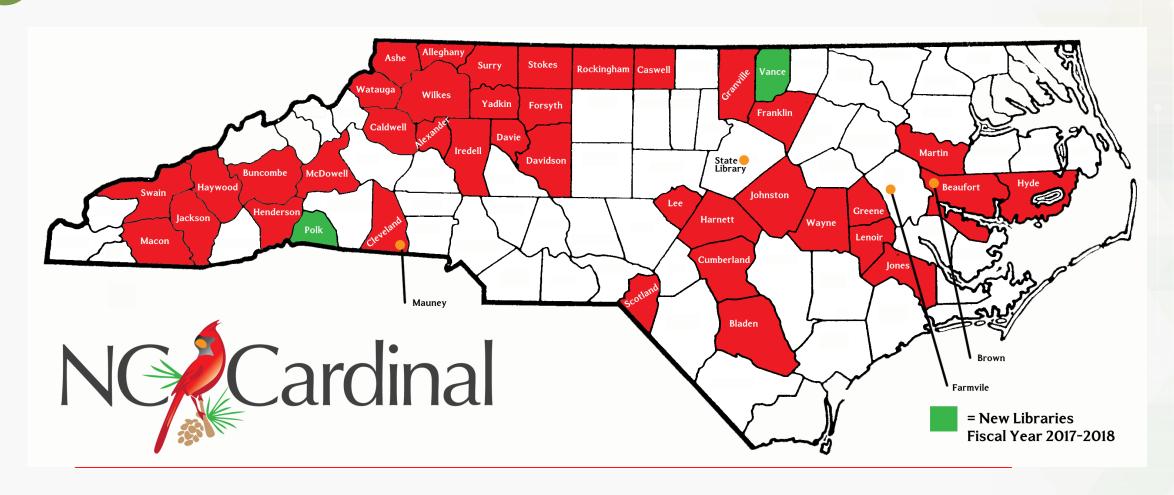


Candid Critters

297 trap circs (May 2017)

Standards
MARC Record Format
Distribution Channel





35 counties, 3 municipalities 145 branches 33% of State



38 counties, 3 municipalities, 7 Special Libraries 161 branches (407 total) 40% of State

Environmental & Organizational Assessment

- Sustainability
- Hosting
- Resource Sharing

Services Provided	Shared ILS	Training	Software Devpmt	Resource Sharing	ILL	Physical D	- 17	Shared eBooks		Group Purchasing	Technical Support	Public PC/Print	Support eRate/
Bibliomation (CT)	Evergreen	Included	Included	Included		State (Re	egional		d Included	Included	Fee Based	Fee Based	Included
CLIC (CO)	Polaris	Included	ය Trai	ining	oftware Devpmt	Resource Sharing	IL	L	Physical Delive	Included	No	Included	No
C/W MARS (MA)	Evergree				Стрин	orioring.	FulFillmnt		Ctata (Dagion	1	Fee Based	Included	No
eiNetwork (PA)	an (CT)	Evergree	en Incl	uded I	ncluded	Included			State (Regional Courier)	Includ	led	Included	No
Evergreen Indiana CLiC Evergreen (CO)		Polaris Inc		uded	N/A	Included	OCLC		Courier	Includ	ied Ir	nclude	
C/W MARS (MA)		Evergreen In		uded I	ncluded	Included	State (ShareIT)		State (Regional Courier)	Includ	ded Ir	ncluded	Fee Based
NC eiNetwork (PA)		Sierra		No	N/A	Included	State		State (Regional Courier)	Stat	e	State	No
(PA State Libr Indiana		Evergreen Ir		uded I	Included Included		State (OCLC)		State (Regional Courier)	Fee Ba	sed Fe	ed Fee Base	
PINES (GA State Library) RAILS (IL)	Virginia Polsk)	Evergree	en						10 to	Includ	ied No	Fee Based No	No
SAILS (MA)	Symphony	Indua	Incl	uded I	ncluded	Included	INN-R	leach	Other Consort	id included	Fee Based	No	No
SHARE (IL)	Polaris	Included	N/A	Included				ree base	d Fee Based	Included	Included	No	No
SJVLS (CA)	Horizon	Included	N/A	Included	OCLC	Regional	Courier	Fee Base	d Fee Based	PCs Only	No	Included	Included
WCCLS (OR)	Evergreen	State	Included	Included	OCLC	Couri	ier	No	State	Included	Included	No	No
WCFLS (PA)	Polairs	Included	N/A	Included	State	Cour	ier	Fee Base	d Event Calendar		Included	No	Included

Assessment

Goals

- Evaluation of current Cardinal system:
 Staffing, Policies, Resource Sharing, Finances, Governance, IT
- Identify trends and stakeholder aspirations
- Compare other Consortia
- Five-year strategic plan

Participants

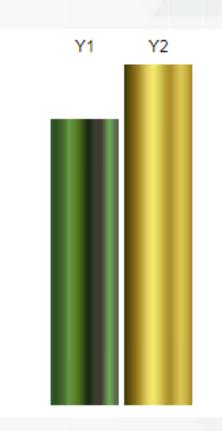
Governance Board, NC Cardinal Staff, Selected Representatives

Process

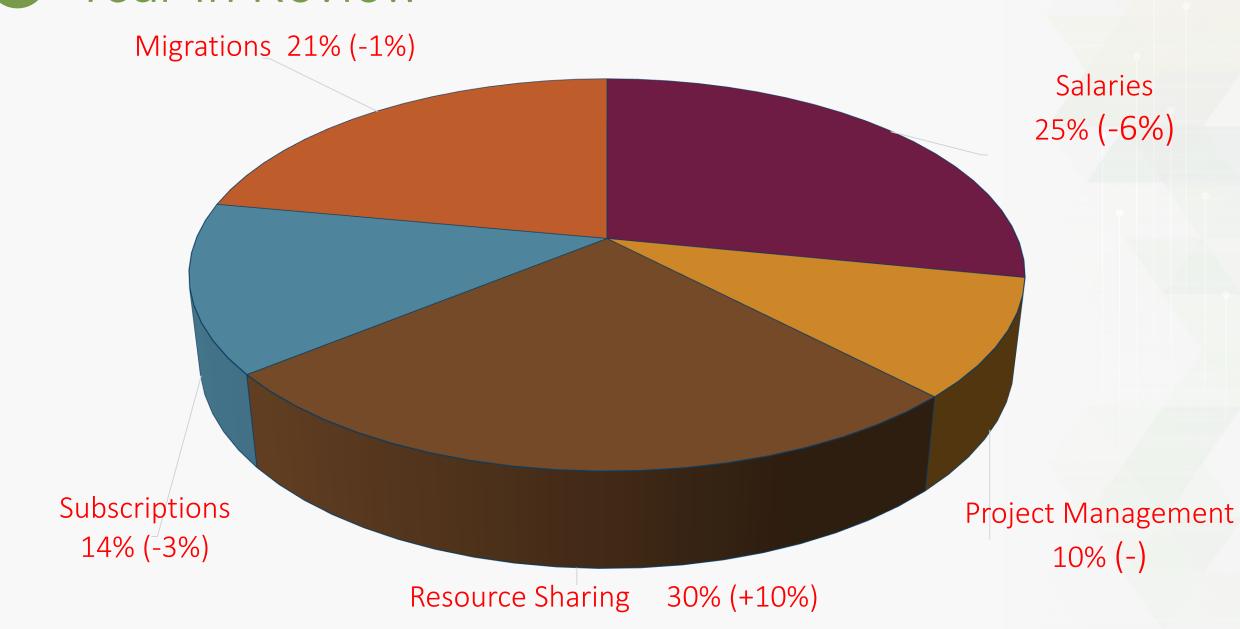
May – August 2016

NC Cardinal by the numbers...

Library items	20%	(6.4 million)
Number of Branches	10%	(161)
Average Monthly Holds Filled	19% 1	(74,260)



FY 2016-2017





Committee & Working Group Updates

New Committee Members

Cataloging Committee

Rolling Off:

Nicole de Bruijn (Appalachian Regional) Martha Crawley (Cumberland County) Serenity Richards (Fontana Regional)

Joining:

Eve Grünberg (Government and Heritage Library) Jessica Philyaw (Fontana Regional) Jennifer Weston (Davidson County)

New Committee Members

Resource Sharing Committee

Rolling Off:

Lise Keppler (Forsyth County)
Caroline Roten (Haywood County)
Jennifer Weston (Davidson County) -> Cataloging

Joining:

Forrest Tate (Henderson County) Krysti Thomas (Cumberland County) Dustin Mobley (Johnston County)



NC Cardinal

https://www.youtube.com/channel/UCEAkZL4ueRoefOuBgtgDBAw



NC Cardinal is a consortium of North Carolina public libraries that share an online catalog and integrated library system (ILS), and shar...

Show more

Created playlists



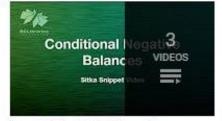
Reports - Evergreen community



Cataloging - Evergreen community



Circulation - Evergreen community



Local Administration - Evergreen community



Offline Transactions - Evergreen community



NC Cardinal cataloger training



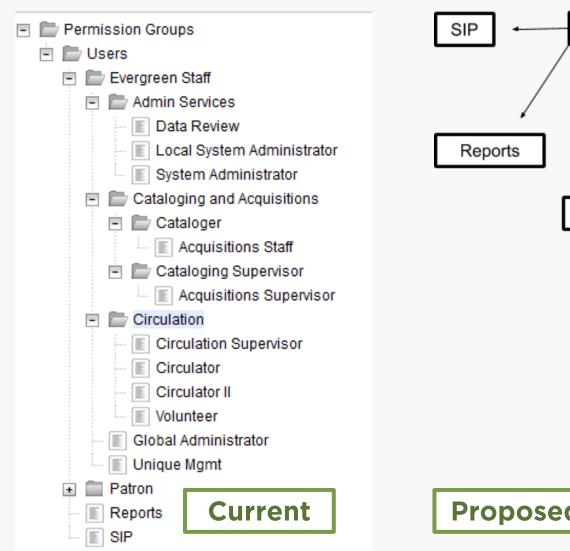
Training & Assessment

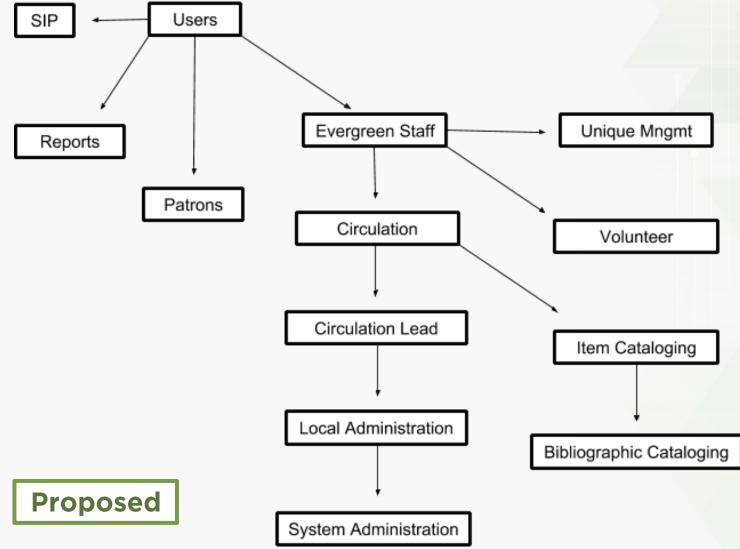
- Development contract with Dr. Sonia Archer-Capuzzo
- Timeline for development and implementation
- Full compliance goal January 2019

Staff Login Accounts

- Governance Board passed the *Staff Login Accounts and Permission Policies* (available to view on the Nest)
- Individual logins for staff using cataloging and/or admin permissions (in progress)
- Staff Login Access Managers & Cataloging Committee help restructure permission groups
- Generic cataloger and admin login accounts permanently deleted by January 2019

Staff Permission Groups Restructure





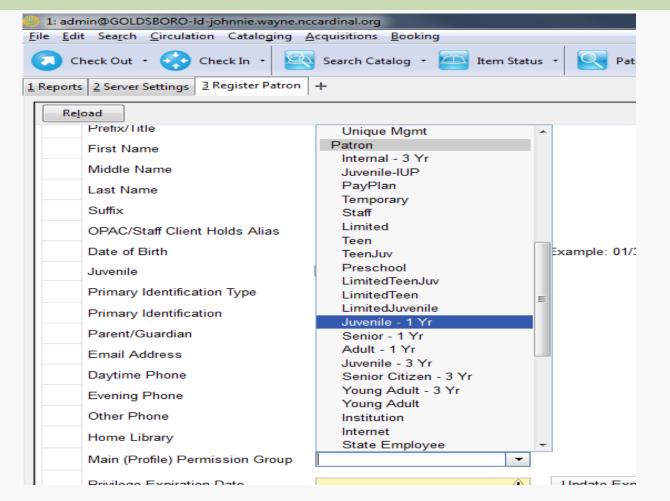
Recommendations

- 7 day Hold Shelf
- In-Transit Report (Lingering Transits Reports)
- Age Hold Protection Report

Patron Permission Groups

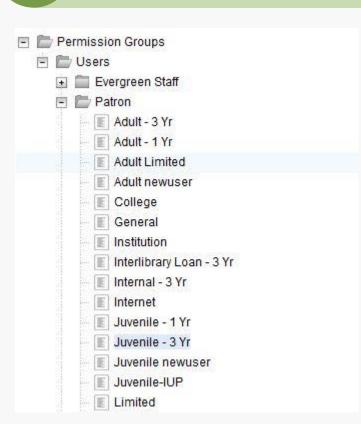
- Patron Permission Groups working group discussions
- Oct-Nov 2017: Cardinal Patron Survey and results
- January 2018: Begin consolidation of Patron Permission Groups

Patron Permission Groups



Patron Account

Patron Permission Groups Tree



Adult - 3Yr : 3 year permission interval

Adult - 1 Yr : 1 year permission interval

Adult Limited: 6 months permission interval

Adult newuser: 3 months permission interval

Internal - 3Yr : 3 years permission interval

Limited - 3 years permission interval

Purpose:

This working group will discuss and recommend authority procedures and policies, undertake work on authority records, make recommendations for when to outsource authority work, and provide recommendations for authority training to NC Cardinal catalogers.

Membership

Vicki Brueck, Senior Cataloger at the Government & Heritage Library, leads the group.

6 additional members - - All responded to call for volunteers

- Sharon Arnette (Henderson)
- Meghan Blackburn (Cleveland)
- Becky Forbes (GHL)
- Christina Martin (Mauney)
- Kim Sirois (Harnett)
- Jennifer Weston (Davidson)

Why Now?

- GHL migration included large number of authority records
- Vicki and staff currently responsible for weekly updates
- Recognized need to expand capacity for authority control

The Beginning...

- Began work in April 2017
- Operating via email discussions and shared documents
- Vicki introduces topics and serves a liaison with Cardinal Staff
- Collaborating with Cataloging Committee

Focus Areas

Best Practice Recommendations

LCSH; LCGFT; Foreign Language

General Documentation for Cardinal Cataloging Community

Resources; Updating Bib Records

Documenting Authority Control in Evergreen (for working group)

- Importing; Maintenance; Known Bugs; New Features
- Needs and specifications for contracted authority work

Continued Review of Authority Types and Sources

• Children's Subject Headings; YA; Graphic Novels, Audiovisual

Consolidation & Deduplication Projects

Consolidation Project

In Progress

- Circulation modifier mapping-complete
- Working with each system on policies
- Reviewing mapping sheets for policies (circulation and hold)

Consolidation Project

Next Steps

- Changes will be made in secondary test
- TESTING, TESTING, and MORE TESTING
- Issues found in testing will be used to correct mappings
- Changes made in production Early/Mid September

Deduplication Project

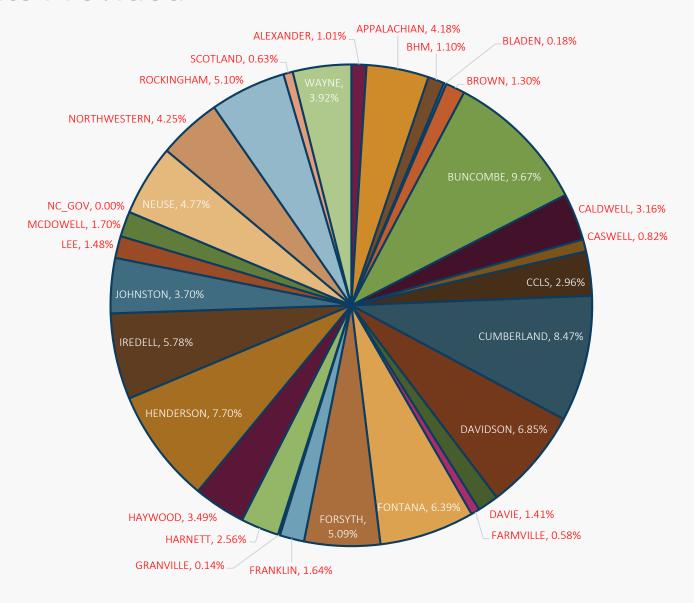
Data Review & Planning

- Determining merge criteria & data cleanup for AV and eresources only
- Report on mismatches and plan for correction either by script or by hand (e.g. item type icons that are missing or do not match holdings circ mod/item type)
- TESTING, TESTING, and MORE TESTING
- Production run in Early/Mid September

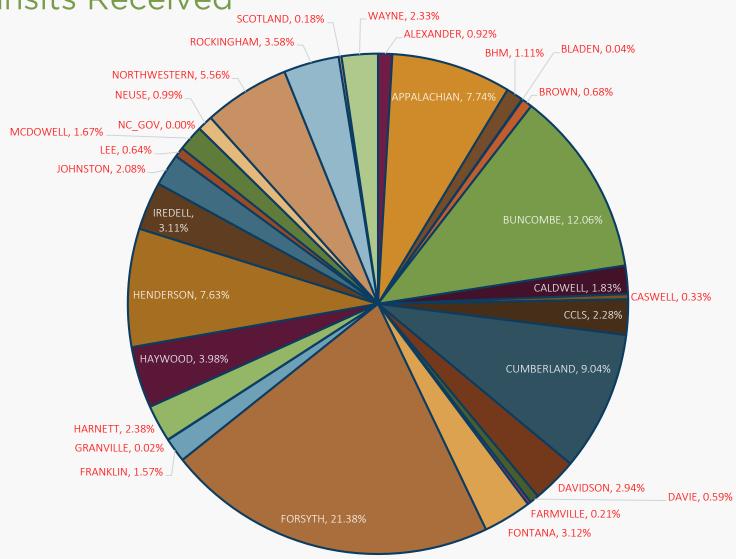
FY 16/17

- Circulations 9,848,676 (42,287,108 circs since beginning of Cardinal in 2011)
- Transits 2,018,071 (6,747,292 transits since Cardinal began Resource Sharing 2013)
- Hold Transits 739,784 (61,648 average monthly)

FY16/17 Percentage Hold Transits Provided



FY16/17 Percentage Hold Transits Received



Change on the PLS for Cardinal

Interlibrary Loans

Library materials, or copies of the materials, provided by one library to another upon request. The libraries involved in interlibrary loans are not under the same library administration; do not count "branch to branch" loans as interlibrary loans. You should count NC CARDINAL <u>transactions</u>.

Question 182

Items loaned (items provided to)

The annual count of library materials, or copies of materials, provided by one library to another upon request.

Question 183

Items borrowed (items received from)

The annual count of library materials, or copies of materials, received by one library from another upon request.

Change on the PLS for Cardinal

Inter-library lending: From Library system A to Library system B

Example: Request from <u>Granville</u> branch and hold is filled by <u>Cumberland</u> branch. System to System. Report in PLS.

Intra-library lending: Request from branch A to branch B, same library system fulfilling the request.

Example: Request from <u>Berea</u> branch (Granville) and hold is filled by <u>Thornton</u> (Granville). <u>Both are within same library system</u>.

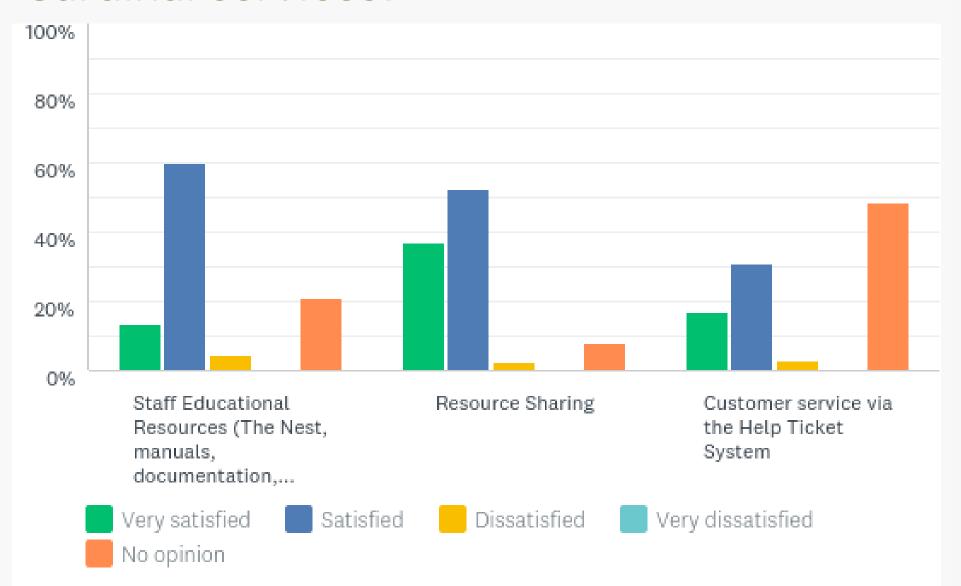
Change on the PLS for Cardinal

What does this mean?

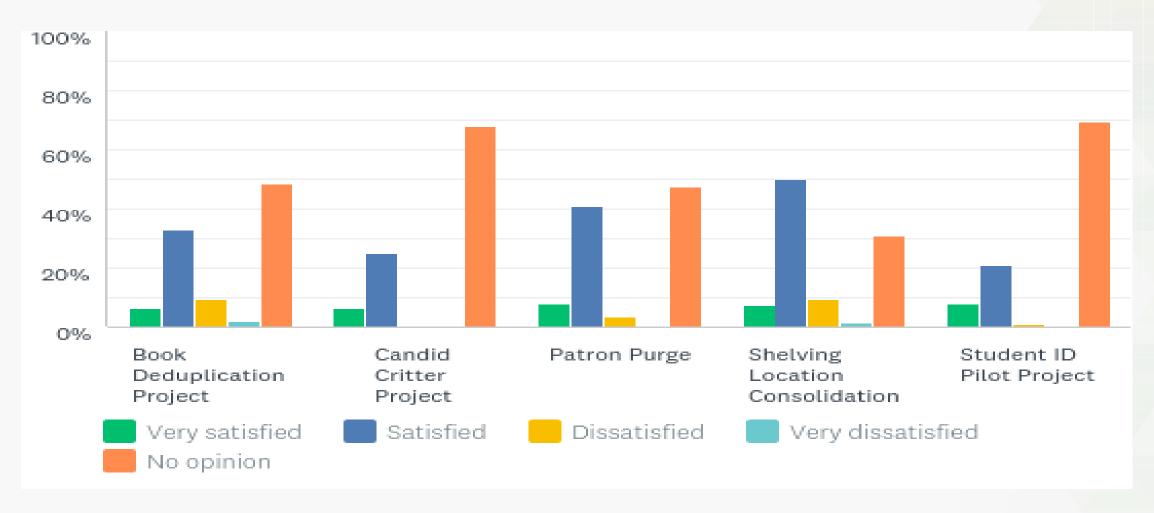
- ILL numbers will decrease this year
- Statistics will show Net Borrowers and Net Lenders
- Please still include ILL numbers outside of Cardinal that you may provide to other North Carolina library systems

2017 NC Cardinal Annual Survey Results

How satisfied are you with the following NC Cardinal services?



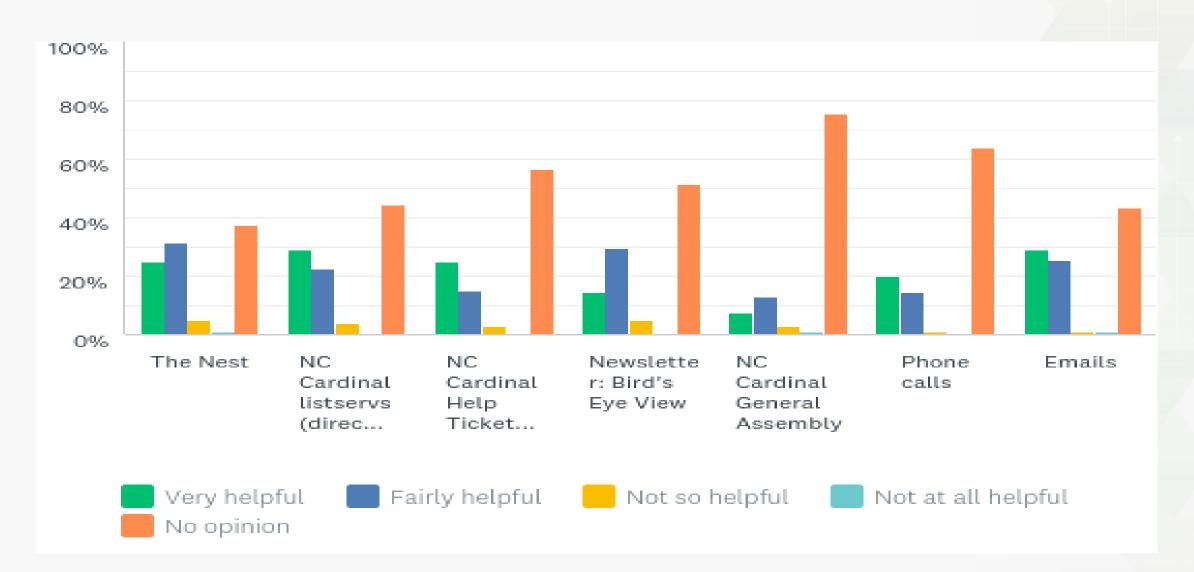
How satisfied are you with the following NC Cardinal projects?



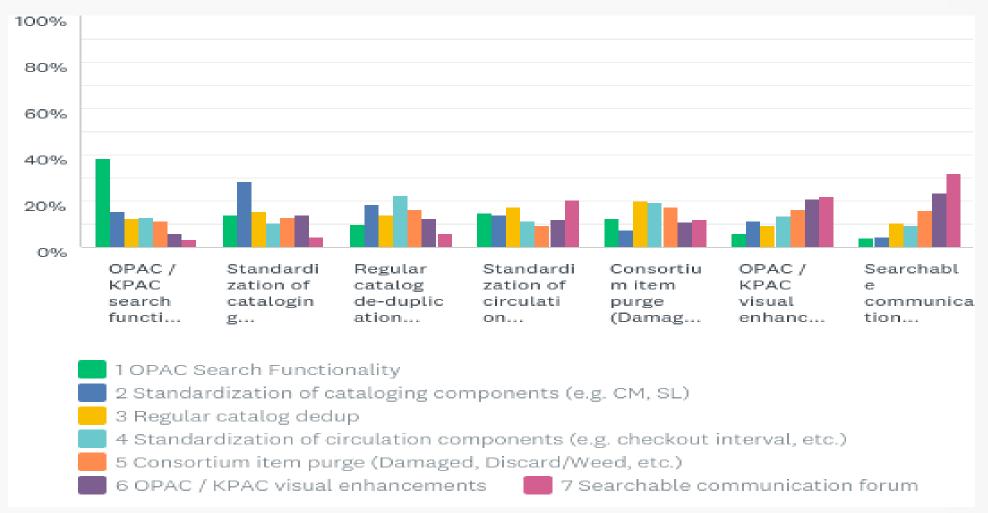
How often do you...?



How helpful to you are each of these NC Cardinal communication methods?



Q8: Ranked existing and proposed development requests in order of priority to you (1-highest to 7-lowest).



Student*Access* Program

Student Access Program

Student Access accounts have the following policies within NC Cardinal:

- Students will have the ability to borrow items from their local library
- Checkout limit is 10 print and/or audiobooks
- DVDs can't be checked out on Student*Access* accounts
- No overdue fines will be charged for School ID accounts
- Accounts will be responsible for lost or damaged books fees
- Student Access accounts will not be able to place holds
- All of Student*Access* accounts will be identified by the permission group "School", including teacher and student records.

StudentAccess Program

- 1. The first step is to get together your Memorandum of Agreement between your Library System and your School organization and your Parent Opt-out Letter
- 2. Collect names and submit spreadsheet by second week in September.
- 3. New accounts issued and ready for use by the beginning of October

Governance Committee Voting Logistics

Governance Committee Voting Logistics

The Governance Committee consists of five (5) members from participating NC Cardinal Libraries and two (2) members from the State Library: the NC Cardinal Program Manager and a representative from the Library Development Section. Governance Committee members must be selected from the Senior Management staff of Member Libraries. There must be at least one representative from: municipal, county, and regional library.

A term of office shall be two (2) years, to commence at the beginning of the next Quarter after the election. The first meeting of the new Committee will determine staggered terms of office.

Only Library Directors are able to vote.

Governance Committee Voting Logistics

<u>Please vote for five (5)</u> candidates total:

- At least one from a Regional Library
- At least one from a Municipal Library
- At least one from a County Library

Nominees:

County Libraries:

Ruth Ann Copley (Davidson)

Gigi Francis (Buncombe)

Cotina Jones (Cumberland)

Michael Roche (Rockingham)

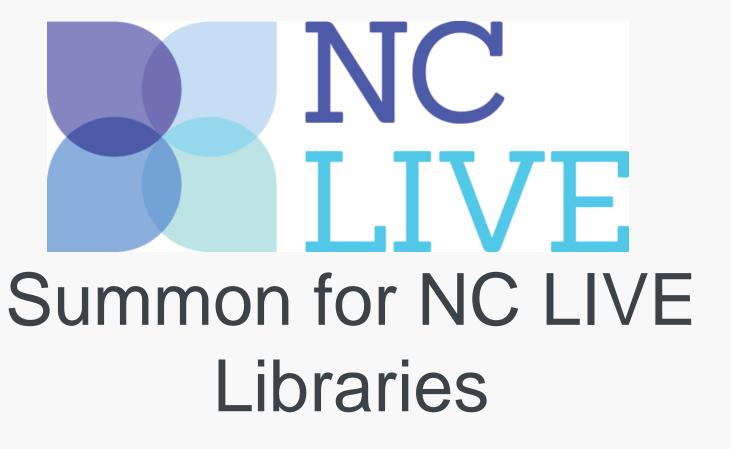
Municipal Libraries:

Sharon Stack (Mauney)

Regional Libraries:

Karen Wallace (Fontana)

Governance Committee Voting & Lunch



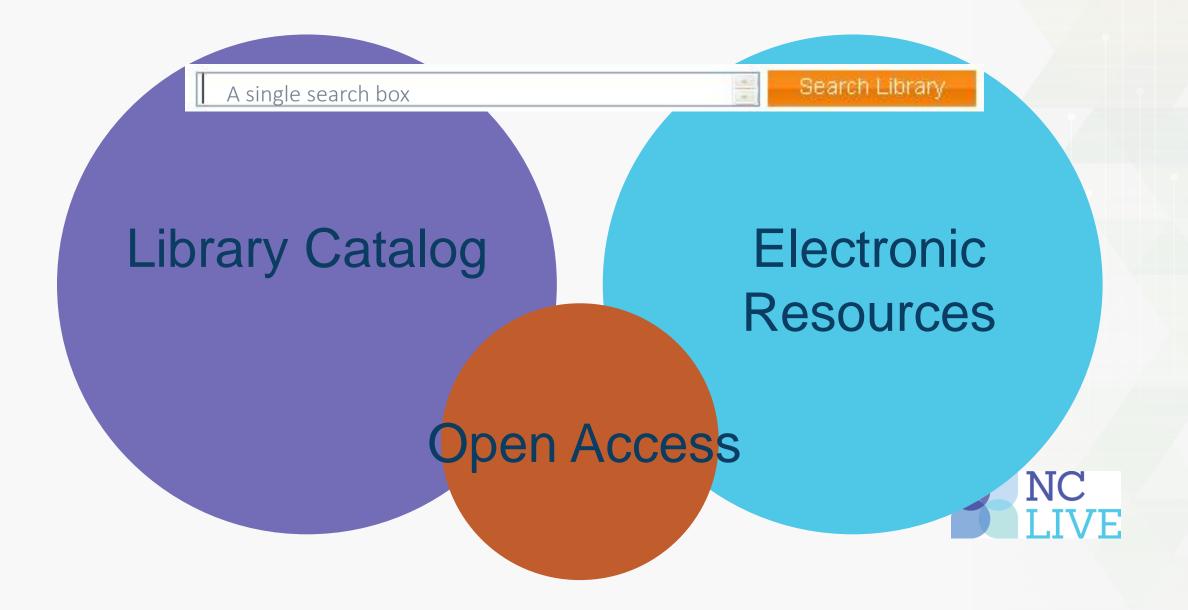
Claire Leverett Assistant Director, NC LIVE

Why use Summon?

- Google and Amazon have raised patron expectations
- Patrons don't want to be trained to search like a librarian
- Quality of content means nothing if patrons can't find it



What is Summon?



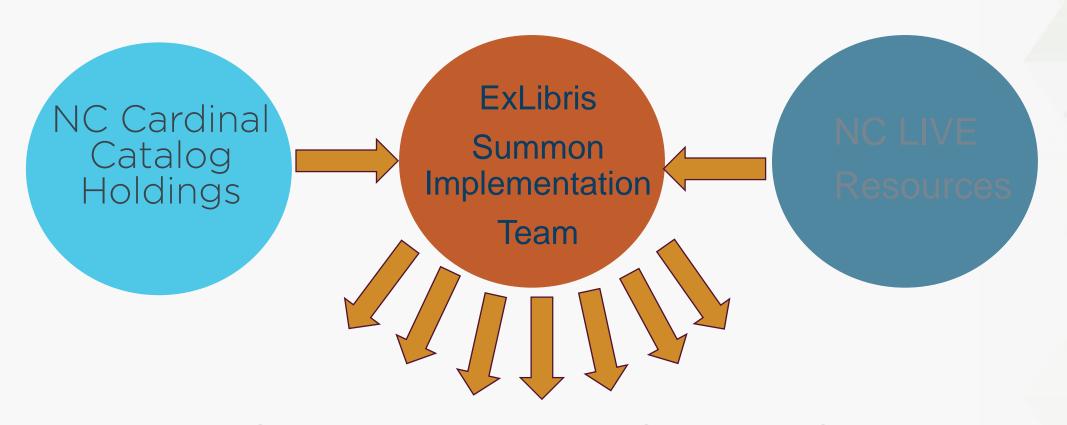
What is Summon?

- A single search box for your library's entire collection
 - print and electronic content
- Relevance ranked results
- All content treated equally
- Available to search without authentication barriers
- Customizable for the library and the user

How does it work?

- Library registers its electronic resources in Client Center
- Catalog holdings are exported to ftp site
- Summon index updated twice weekly

For NC Cardinal

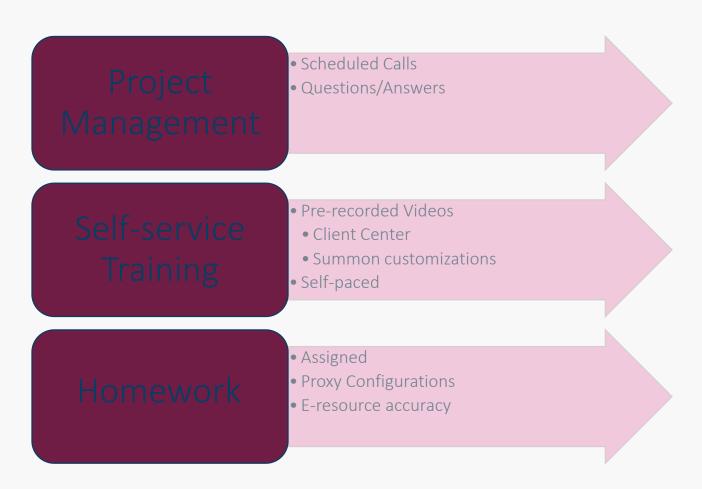


Summon Instances for Cardinal NC Libraries

12 week process on average

ID	Task Name	Duration			二月 2016				三月 2016				
			24/1	32/1	7/2	14/2	21/2	28/2	6/3	13/3	20/3	27/3	
1	Project Creation	1w			10 10				\$ 311				
2	Project Start	1w											
3	Configuration & Basic Setting	2w											
4	Database/Title Population	3w											
5	ILS Integration	6w											
6	Summon Launch and Project Closeout	1w											

Training and Implementation



From Jane Burke's presentation on Summon for NC LIVE

Other information

- Summon part of a 6-year contract with ProQuest
- No cost to NC LIVE libraries
- 360 Link included
- More info and webinar about Summon webinar at
 - www.nclive.org/summon-for-nclive-libraries

Summon Sites in North Carolina

Wake Forest University
Campbell University
Wake County Pub Library
Wake Technical College
Warren Wilson College
Cleveland Community College
Methodist University
Meredith College
Pfeiffer University
Central Carolina Community College
Surry Community College
East Carolina

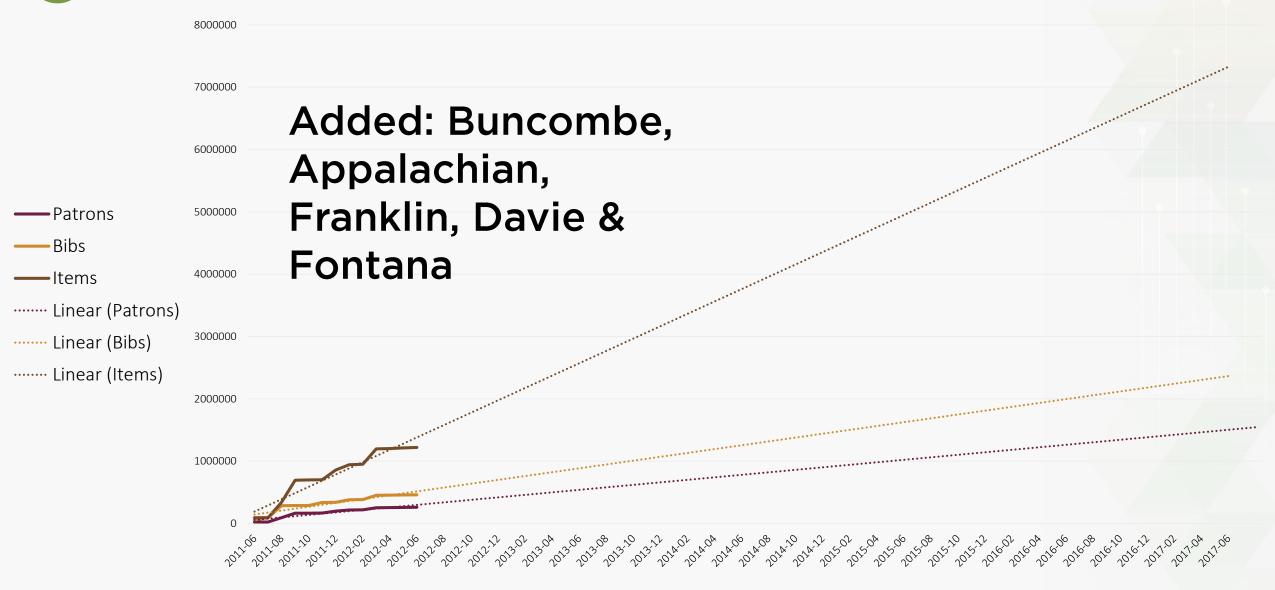
Questions?



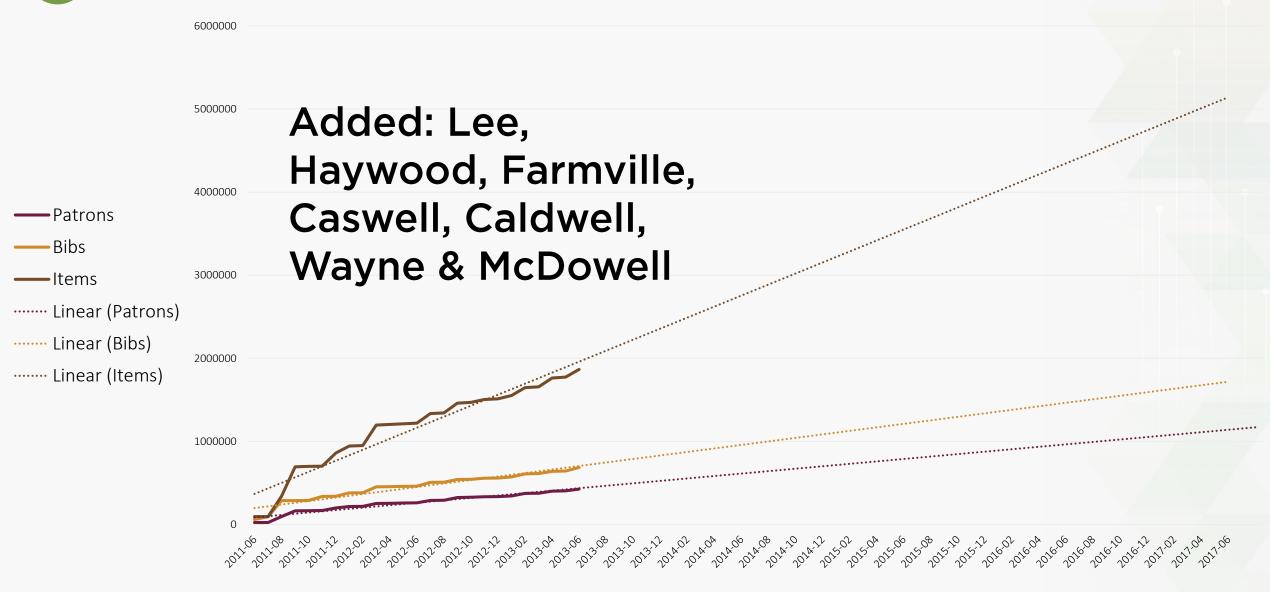
New Governance Committee Members Announcement

FY 2017-2018 and The Way Forward...

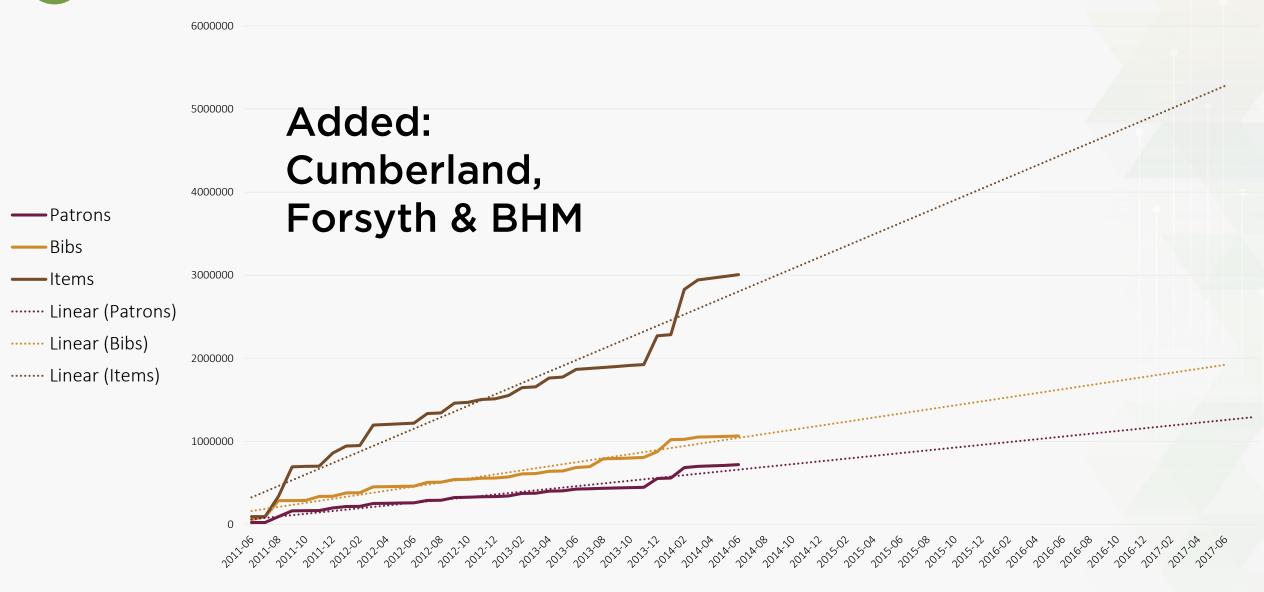
Growth in NC Cardinal: FY 11-12



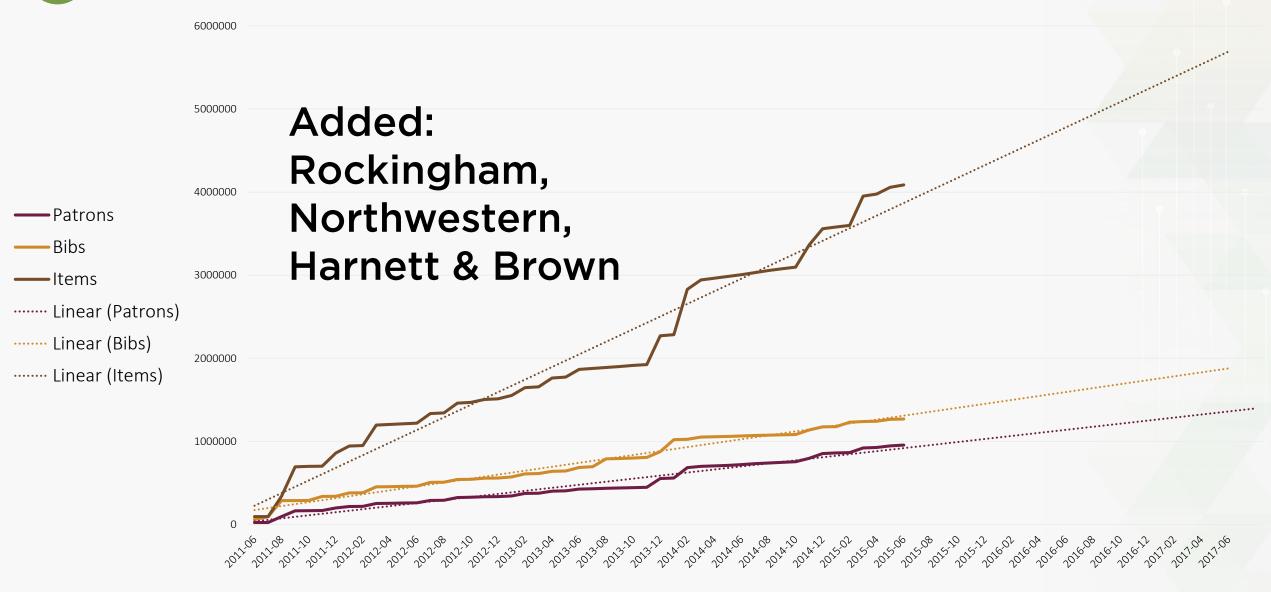
Growth in NC Cardinal: FY 12-13



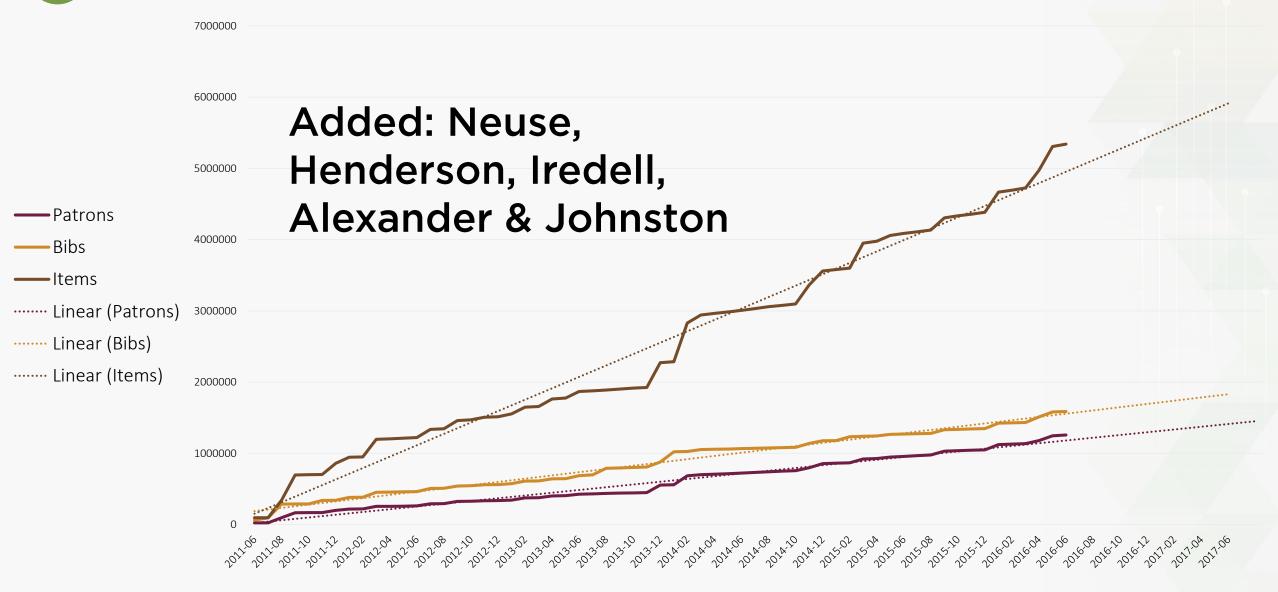
Growth in NC Cardinal: FY 13-14



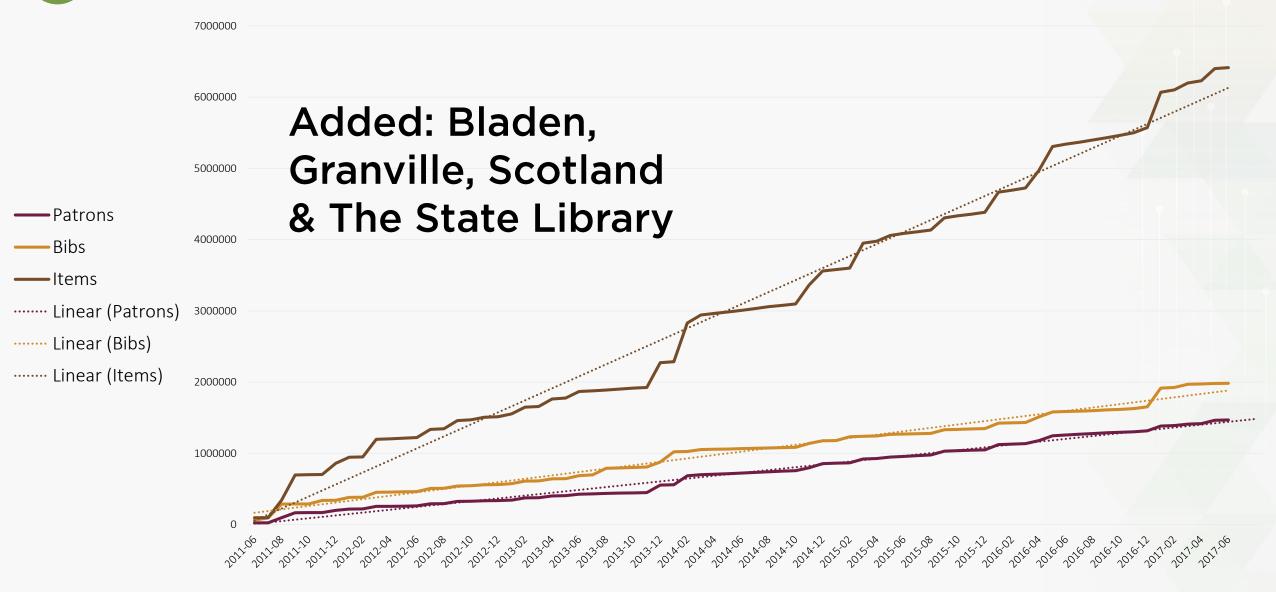
Growth in NC Cardinal: FY 14-15



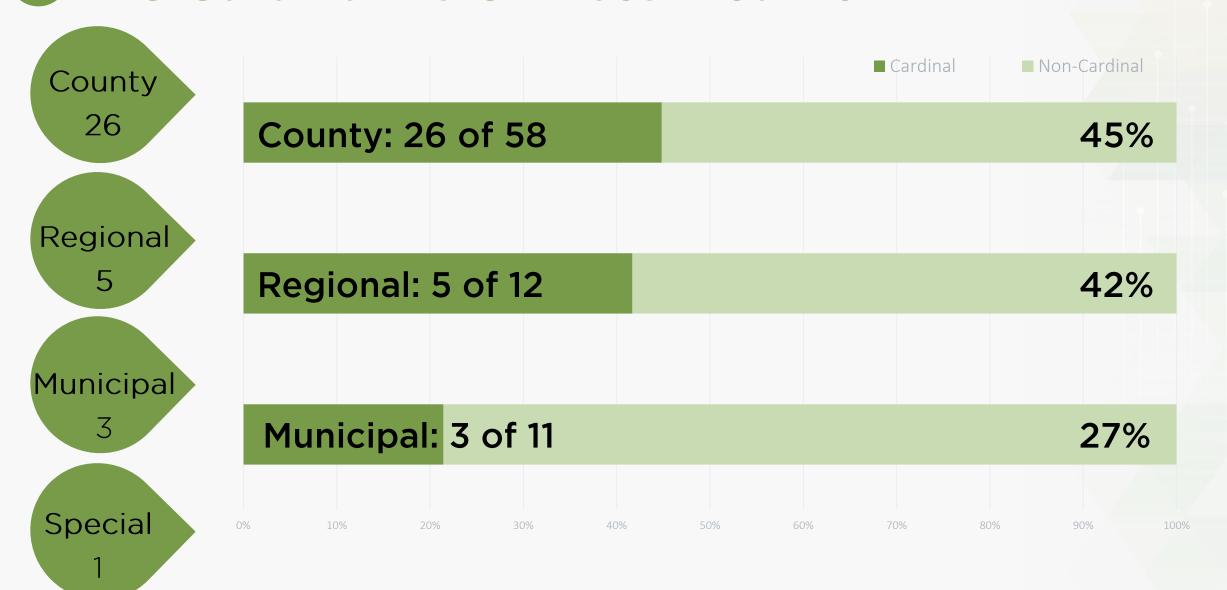
Growth in NC Cardinal: FY 15-16



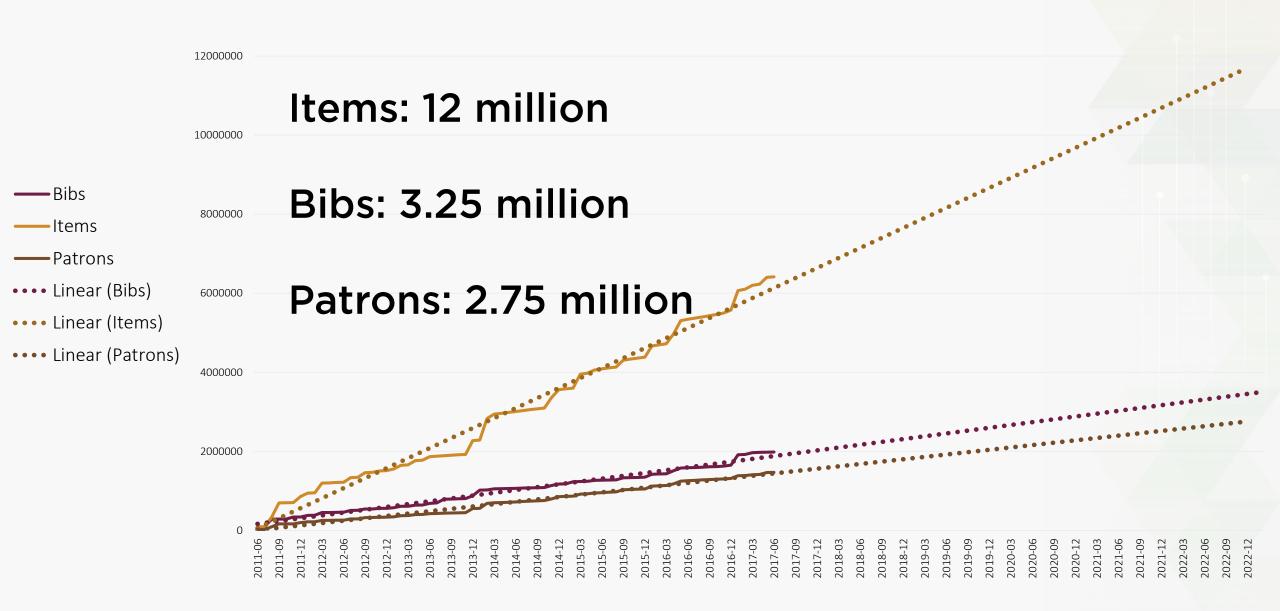
Growth in NC Cardinal: FY 16-17



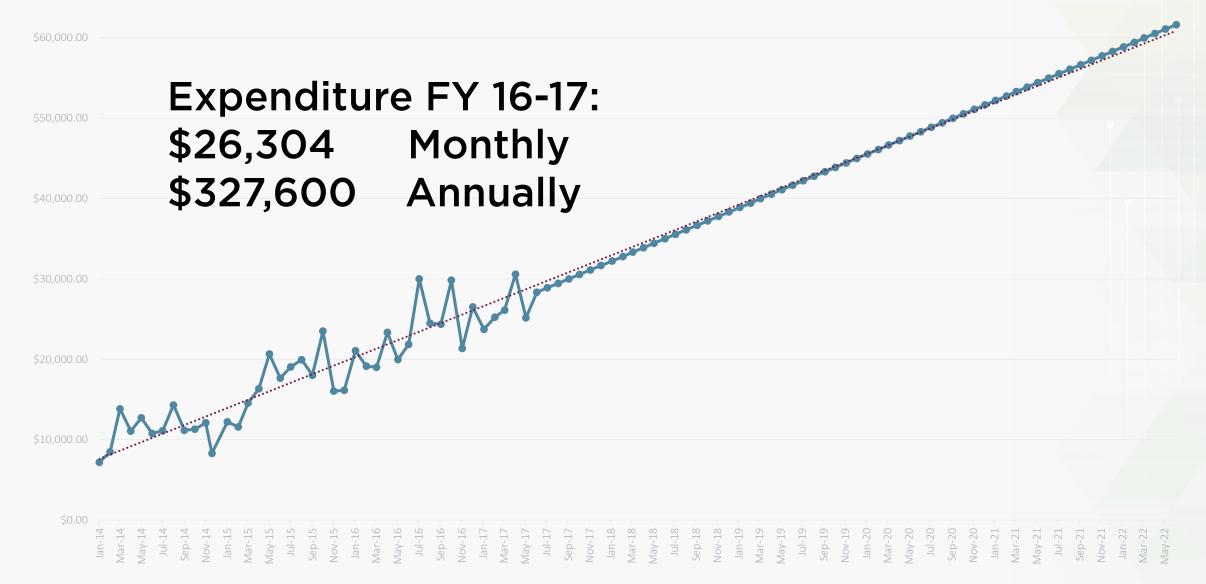
NC Cardinal As Of Fiscal Year 16-17



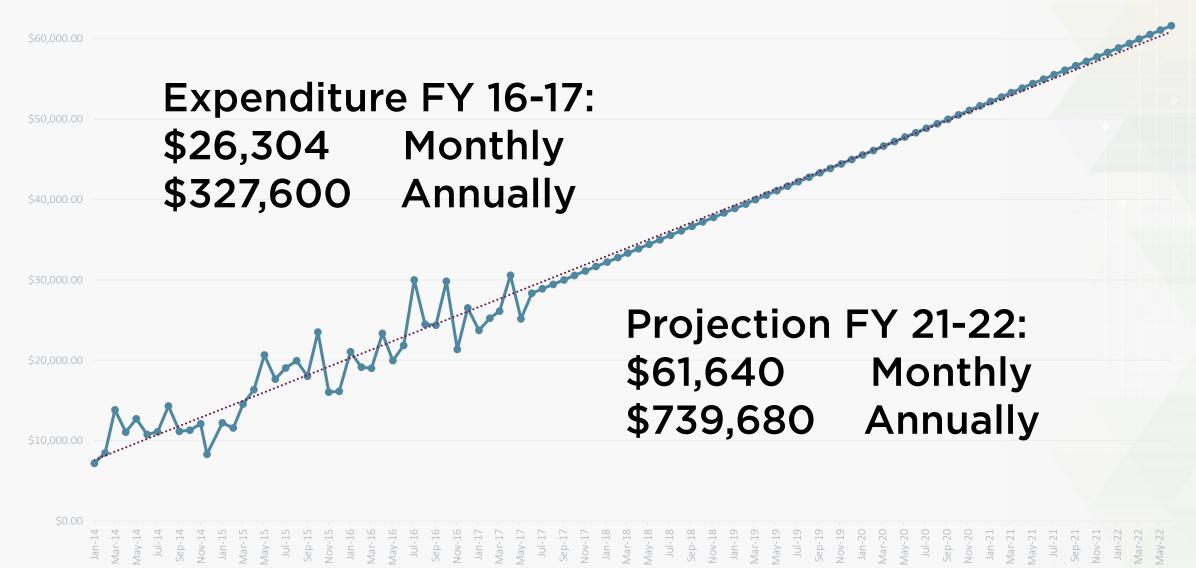
Projections for Five Years from Now



Transit Projections for Five Years From Now



Transit Projections for Five Years From Now



What are we doing right now to move NC Cardinal forward?

Invitation For Bid for Evergreen Hosting Vendor

Environmental and Organizational Assessment Leads to Strategic Planning

Resource Sharing Assessment

Summon Discovery Layer Project

Invitation for Bid And Hosting Possibilities

Invitation For Bid and Hosting Possibilities

Current Contract

Six Month Extension

New Contract

Invitation For Bid and Hosting Possibilities

Current Contract

Six Month Extension

Migration

New Contract

Summary of Recommendations:

Collaboration:

Increase participation in larger Evergreen community

Resource Sharing:

Consider adding additional organizational grouping for hold targeting

Summary of Recommendations:

Resource Sharing:

Put out an RFP for a regional courier service

Set standards for delivery and turn around timing

Summary of Recommendations:

Communications:

Communicate announcements via blog rather than email

Improve the use of the Help Desk Ticketing System

Summary of Recommendations:

Additional Services:

Explore ILL

Purchase eBooks as a consortia

Summary of Recommendations:

Institutional Change:

Access Hosting / Support Options

Move towards more shared costs and reduce reliance on LSTA funds

Summary of Recommendations:

Institutional Change:

Investigate independence of the State Library

Clarify engagement required from member libraries

Summary of Recommendations:

Committees:

Use committees to publish Common Standards, Practices and Policies throughout the consortium

Draw on different talents sets for the Governance Committee

Summary of Recommendations:

Connectivity:

Work with E-Rate to improve the network systemwide

Keep the focus on public libraries

Resource Sharing Assessment Project

Resource Sharing Assessment Project

What are we trying to accomplish?

We would like to engage a consultant to analyze:

- The policies used to generate holds
- The processes used to ship materials
- Whether our UPS contract is better than a courier service
- The ways that the consortium's resource sharing can be improved to make these efforts more sustainable
- The value these shared resources provide to recipient libraries

Resource Sharing Assessment Project Some of the questions we'd like to answer...

- How consistent are transit times throughout the consortium?
- Are library systems equally sharing the burden of resource sharing?
- Are materials moving in the most efficient routes, and if not what policies can be implemented to select the most viable item to fulfill a hold request?

9 8

Resource Sharing Assessment Project Some of the questions we'd like to answer...

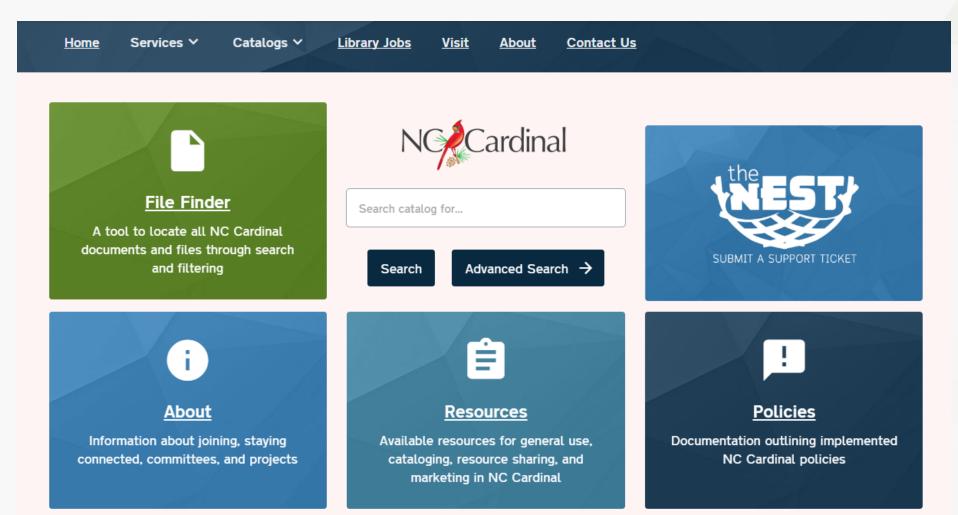
- What is the trade off between speed and expense?
- Could targeted purchasing or collaborative collection development reduce the frequency of long distance transits throughout the state?
- How might library systems work together collectively to meet demand for new titles?

9 9

Resource Sharing Assessment Project Some of the questions we'd like to answer...

- Should resource sharing policies differ according to library location or collection size?
- What is the cost / benefit ratio for libraries sharing resources and how can participants collaborate to improve the shared value?

http://statelibrary.ncdcr.gov/ld/nc-cardinal



Home Services > Catalogs > Library Jobs Visit About Contact Us

+2

| Catalogs > Library Jobs | Visit | About | Contact Us | Contact Us

How To Join Cardinal

Information on how to become a member of NC Cardinal

Stay Connected

Keep up to date by joining our mailing lists and reading the monthly newsletter

Committees

Find out more about the Governance, Cataloging and Resource Sharing Committees as well as other working groups



Projects and Initiatives

Descriptions and tools for ongoing projects in NC Cardinal

Who We Are

Alexander County

Appalachian Regional

Cleveland County

Cumberland County

Granville County

Harnett County

McDowell County

Northwestern Regional

<u>Home</u>	Services Y	Catalogs ∨	<u>Library Jobs</u>	<u>Visit</u>	<u>About</u>	Contact Us
Search:						
		Apply				

Title	Description	File Type	Category
UPS Address Import Instructions	Instructions on how to import the latest Library Hub <u>address list</u> to your UPS address book.		resource sharing
UPS Address Import File	UPS address file to import into your account. This file must be a .csv file to import.		resource sharing
System Slow Instructions	Information to include in a help ticket when a library is experiencing a slow database.		
System Down Instructions	Instructions for submitting a help ticket when the system is down.		
Shipping Branches	A comprehensive list of systems and their branches; the shipping hub library is also identified.		resource sharing
September 2016 Newsletter	The Bird's Eye View newsletter from September 2016.		newsletter
Resource Sharing Manual	Contributed by the RSTF committee. This document outlines best practices for resource sharing within NC Cardinal. All policies and procedures are recommended for implementation throughout the consortium. As issues arise, this document will be amended.		resource sharing

The update to 2.12 and eventually 3.0

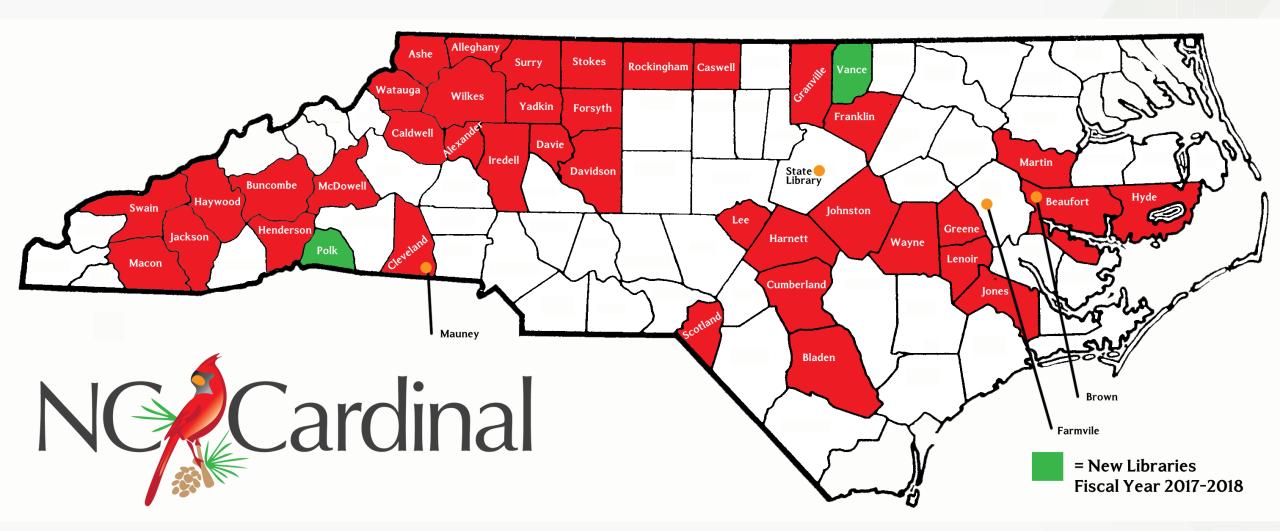
2.12

Test in October?
Production in November?

3.0



New Libraries Migrating in FY 2017-2018



Consortial Communications

What is the best way to keep everyone up to date with relevant information, about committees and working groups, training opportunities, etc.?

How do we make sure that different audiences have the information that's of interest to them?

Training

How can the NC Cardinal staff meet you at your point of training need?

- Online documentation and guides
- Task oriented videos
- Webinars and online "office hours"
- In person training and meet ups

Training Documentation on KnowledgeBase

NC Cardinal Help Ticket System

Home

Submit a Request Check on a Request

Knowledge Books

- Reports in Evergreen
- Administrative

Manual

<u>Home</u> → <u>Reports in Evergreen</u> → **Printer Friendly Version**

Reports in Evergreen

Documentation of the reporting module in Evergreen and NC Cardinal reporting procedures.

Incorporates elements of Evergreen Documentation under Creative Commons Attribution Share-Alike 3.0 License (https://creativecommons.org/licenses/by-sa/3.0/legalcode) and available to share under the same license.

1. Introduction to Reports

1.1. Reports permission group

Folders

2.1. What Are Report Folders?

2.2. Creating Folders

2.3. Managing Folders

3. Templates

3.1. Find Existing Templates

3.2. Cloning Templates

4. Generating reports

4.1. Run a report template

Report Output

5.1. Viewing report output

1. Introduction to Reports

1.1. Reports permission group

Evergreen permits access to report folders based on login account. All permission groups in NC Cardinal have reporting permissions, so any staff member can create, clone, and run reports using their individual login or a shared generic circulation login account. By default, report folders are not

nccardinal support.org

What is the best organizational process to go from an idea to a policy?

How do we use our committees to scrutinize ideas, make recommendations and decisions?

How do we codify those decisions and best practices?

How do we document them so that they are easy for everyone to find and implement?

Longer Term Strategic Planning

What it will take to sustain NC Cardinal as a program?

How do we meet the needs of our users in the years ahead?

Shifting Gears

"NC Cardinal has many characteristics of a startup beginning to see the need for a higher level of sophistication, accountability, and strategic intentionality. There has been a shift of focus from "growth" to organizational sustainability, consolidation, and standardization of practices, policies, and procedures, enhanced training of system and library staff, improved migrations, and opportunities to shift from the current hosting, administration, and support of the ILS to a new operational model." Environmental and Organizational Assessment

Ideas!

Questions?

And

Discussion...



