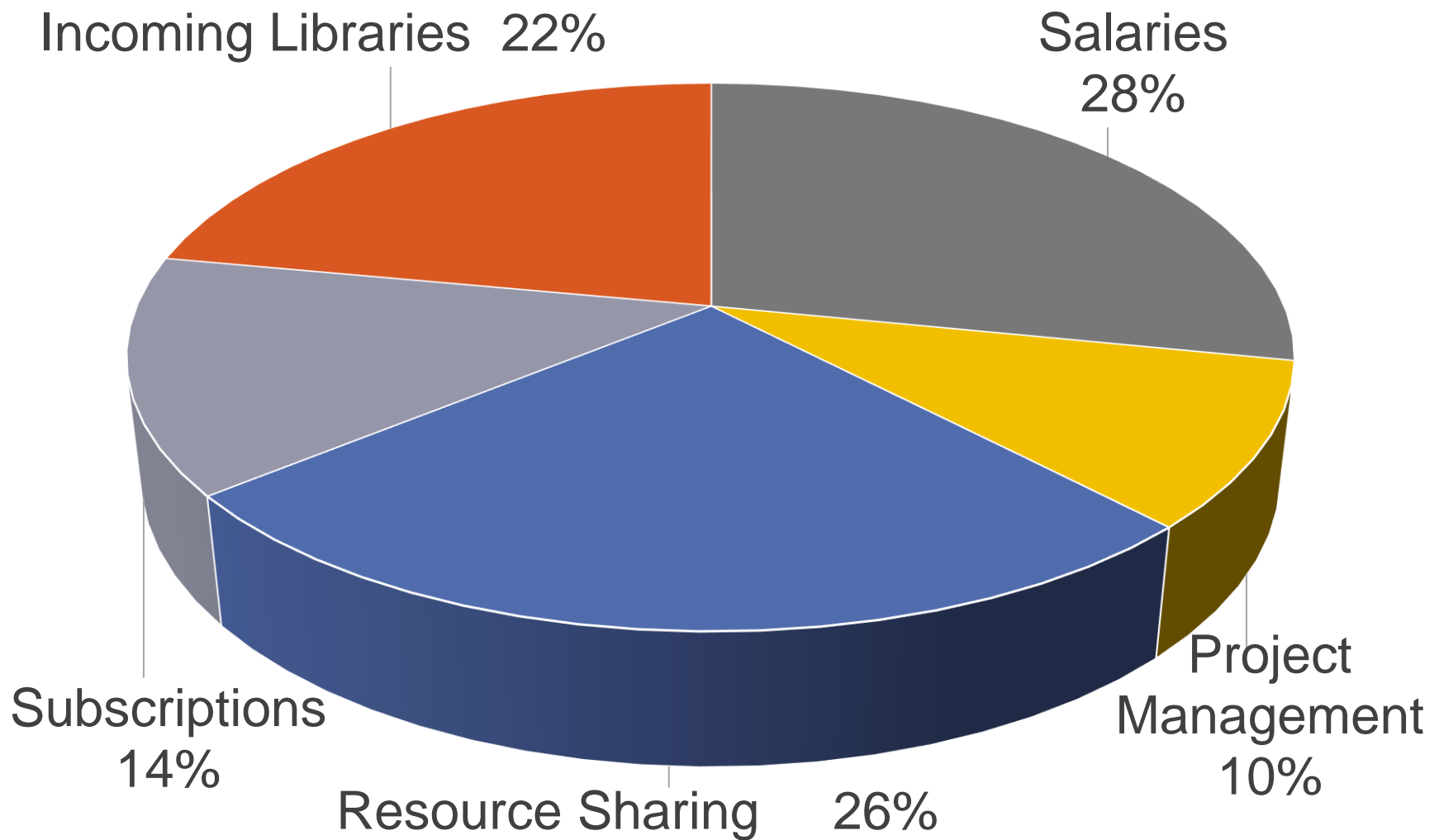# NC CARDINAL MEMBERSHIP MEETING

June 9, 2015
Chapel Hill, North Carolina

AGENDA

I. Welcome

II. FY2015-16: Year in Review

III. FY2016-17: Upcoming Activities

IV. Discussion Groups

    A. OPAC Customizations

    B. Patron Types

FY2014-15

Incoming Libraries 22%

Salaries 28%

Subscriptions 14%

Resource Sharing 26%

Project Management 10%

FY2014-15

Equinox

- Sequoia (fall 2014)
- Security patches
- V2.6 and V2.7 upgrades
- Performance patches
- Daily purges
- Removal empty bib records

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FY2014-15

State Library Support

- Staff expansion
  - ➢ April Durrence
  - ➢ Johnnie Pippin
- Removal – Albemarle records
- Standardization
- Deduplication project
- Empty bib removal

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FY2014-15

- Training
  - ➢ Reports
  - ➢ Circ Best Practices
  - ➢ RDA (basic and serials)

Tackling RDA	77
Reports Training	45
Circ Best Practices	54
Cataloging Forum	45

FY2014-15

Communications

- SEREC 2014
- Committee work
- Published manuals/best practices
- Cataloging Forum
- Conference Scholarships

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FY2014-15

Conference Scholarships (10)

|	
Robina Norman (BHM)	**Carine Mattix (Appalachian)**
Jennifer Dale (Forsyth)	Forest Doyle (Buncombe)
Jonathan Furr (Forsyth)	Bonnie Dail (Wayne)
Nicole de Bruijn (Appalachian)	Marion Waters (Wayne)
Martha Crawley (Cumberland)	Susan Craven (Davidson)

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FY2014-15

Migrated Libraries

- Rockingham
- Harnett
- NWRL
- Brown
- Neuse Regional

FY2014-15

= Incoming Libraries FY2015-2016
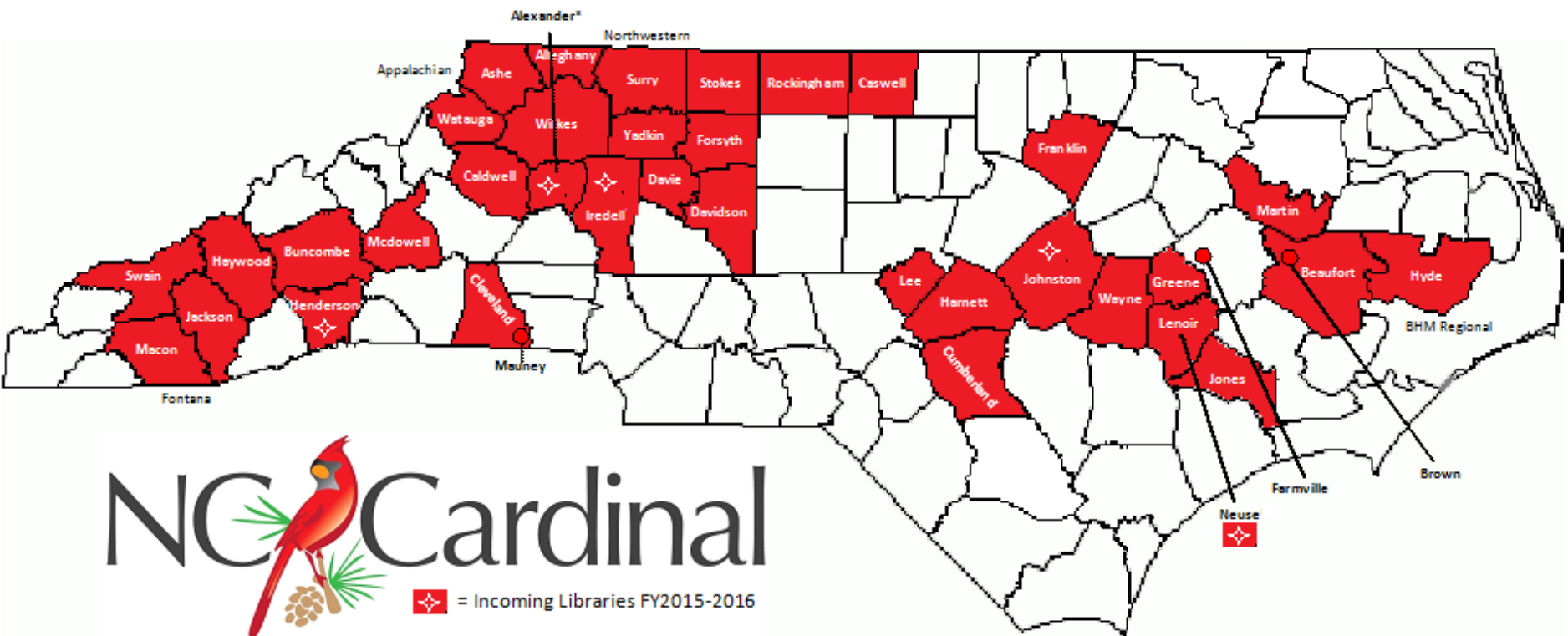
31 counties, 3 municipalities
116 branches
31% of State

FY2014-15

Development

- Acquisitions enhancements
- V2.7 &v2.8 enhancements
- Cataloging sprint; browser-based web client

FY2014-15

DEMO – web client

here:
Login= admin
Password = demo123

FY2014-15

NC Cardinal by the numbers…

Library items	5.1 million
Bibliographic Records	1.7 million
Average Monthly Transits (Total Transits)	97,470 (2.8 million)
Avg Monthly Circulations (Total Circs)	690,000 (8 mill)
Active Patrons (Population Served)	1.2 million (2.5 mill)

FY2015-16

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FY2015-16

- Evaluation of Resource Delivery System

- Expand communications

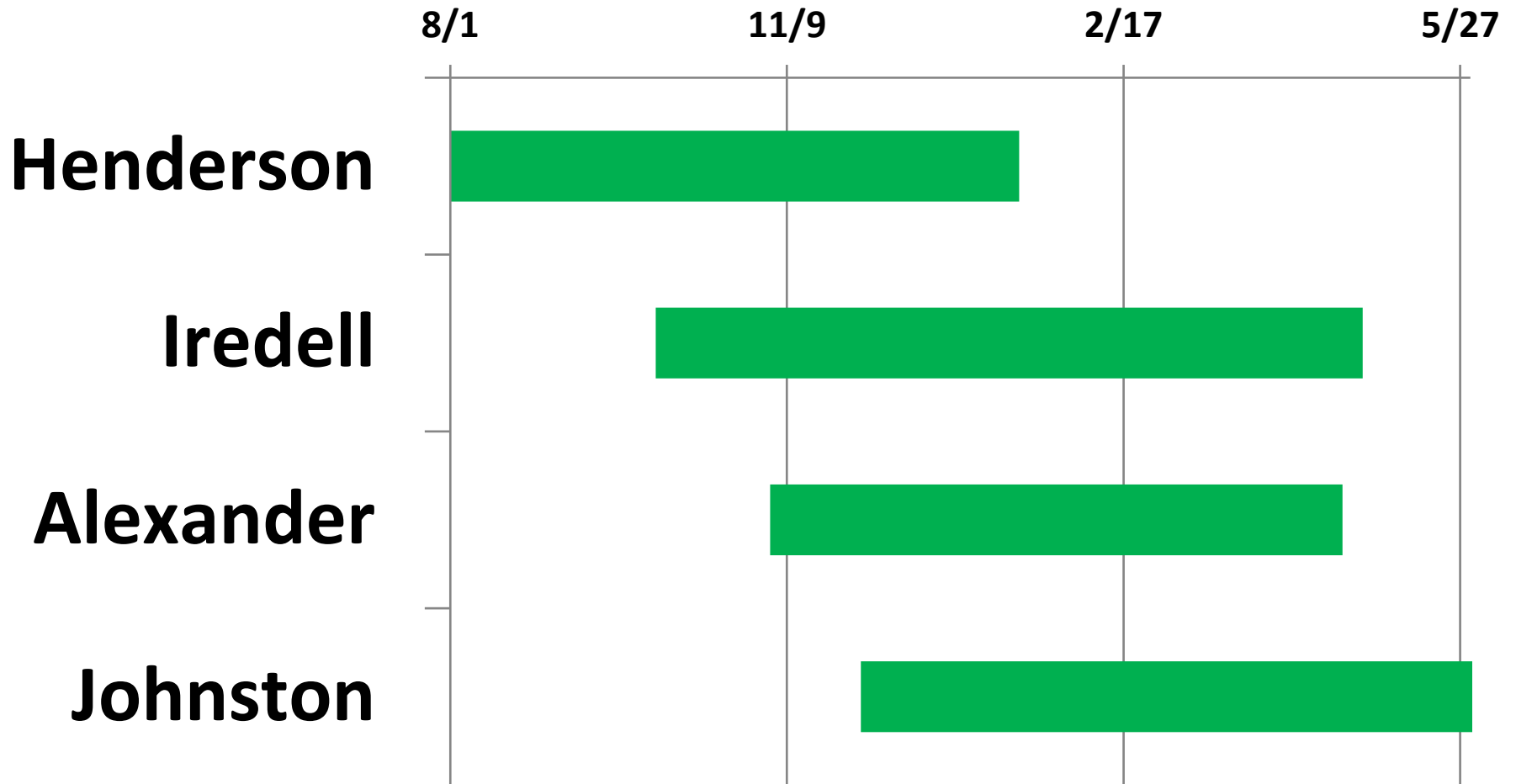 ➢ Follow-ups, remote web tools, "check-ins"

FY2015-16

Strategic Planning

FY2015-16

- **Customer Service Expansion**
  - Adding team member - Help Desk Specialist
    - Central focus - help ticket response
    - Develop FAQ and documentation
  - Virtual Visits – 'check-in' meeting with each library
- **Training Expansion**
  - Intermediate Reports – Fall 2015
  - Online training options – Winter 2015-16
- **Incoming Libraries**

STATE LIBRARY
of NORTH CAROLINA

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FY2015-16

Evergreen Conference
April 20 – 23, 2016

STATE LIBRARY of NORTH CAROLINA

7/25/2022

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VOTE!

Governance Board Voting!

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Governance Board Candidates

| Municipal	
Sharon Stack	
Regional	
Karen Wallace	
County	
Ruth Ann Copley	**Rosemary Loomis**
Gigi Francis	**Jody Risacher**
Elizabeth House	**Michael Roche**
Holt Kornegay	**Elizabeth Skinner**

FY2015-16

Committees

- Resource Sharing
- Cataloging
- Governance
- Patron-focused: NEW

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FY2015-16

Resource Sharing Committee

- Delivery system evaluation
- Resource Sharing Statistics – Individualized Handout

FY2015-16
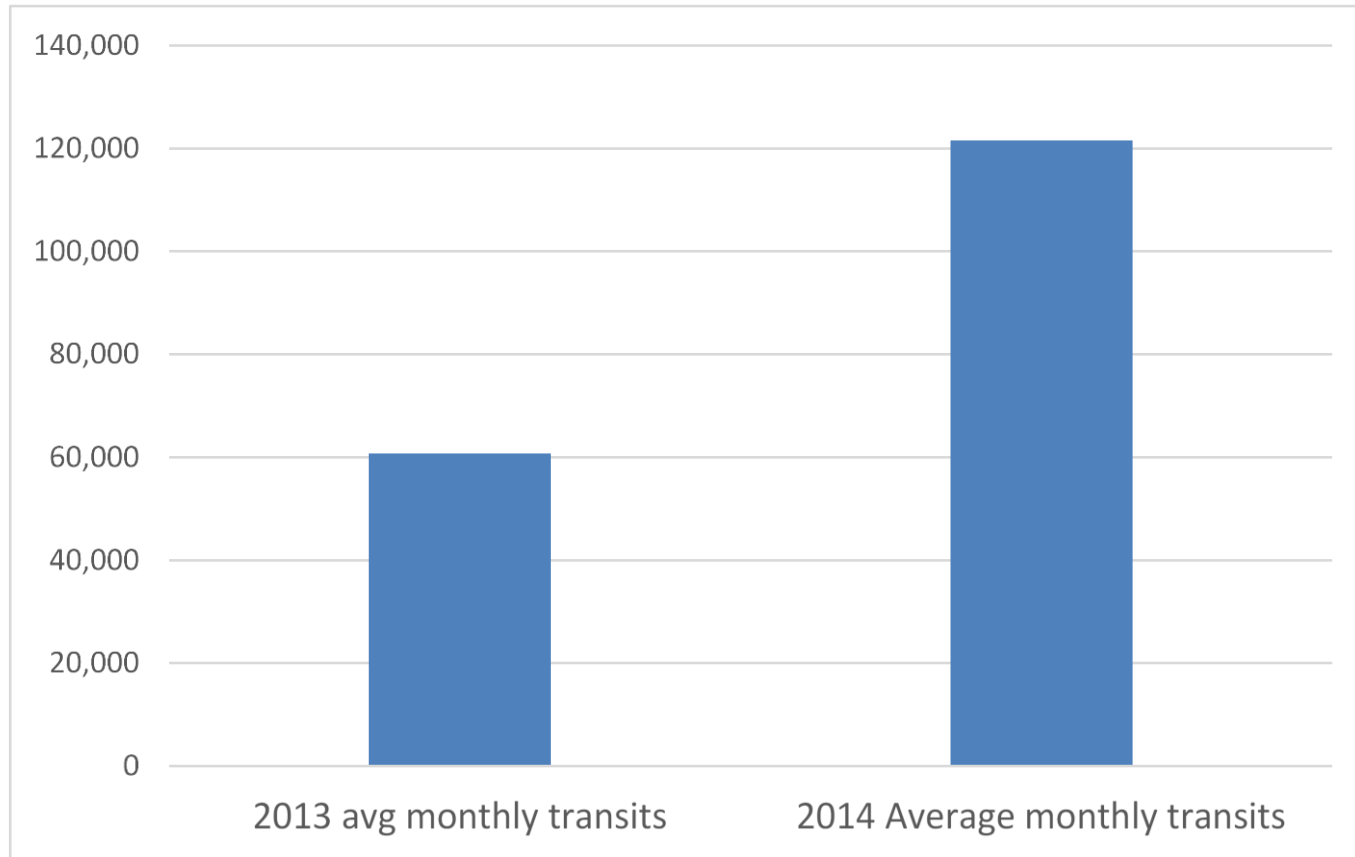
Number of Items Transited between Member Libraries
Total Transits for 2014 = 1,459,291

FY2014

Resource Sharing Costs 2014	$132,300 ($11,000 avg mth)
Total Packages Sent	27,106 (28.33 weekly)
Average Cost	$138.40
Average Cost per Package	$4.63

FY2014

Total Transits 2014	1.46 million (122,000 mth avg)
Total Intra-transits	1.23 million (102,000 mth avg)
Total Inter-transits	239,994 (20,000 mth avg)
Net-Borrower	Forsyth / Franklin
Net-Lender	Fontana / McDowell

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2014 RESOURCE SHARING

2014 Total Packages Sent
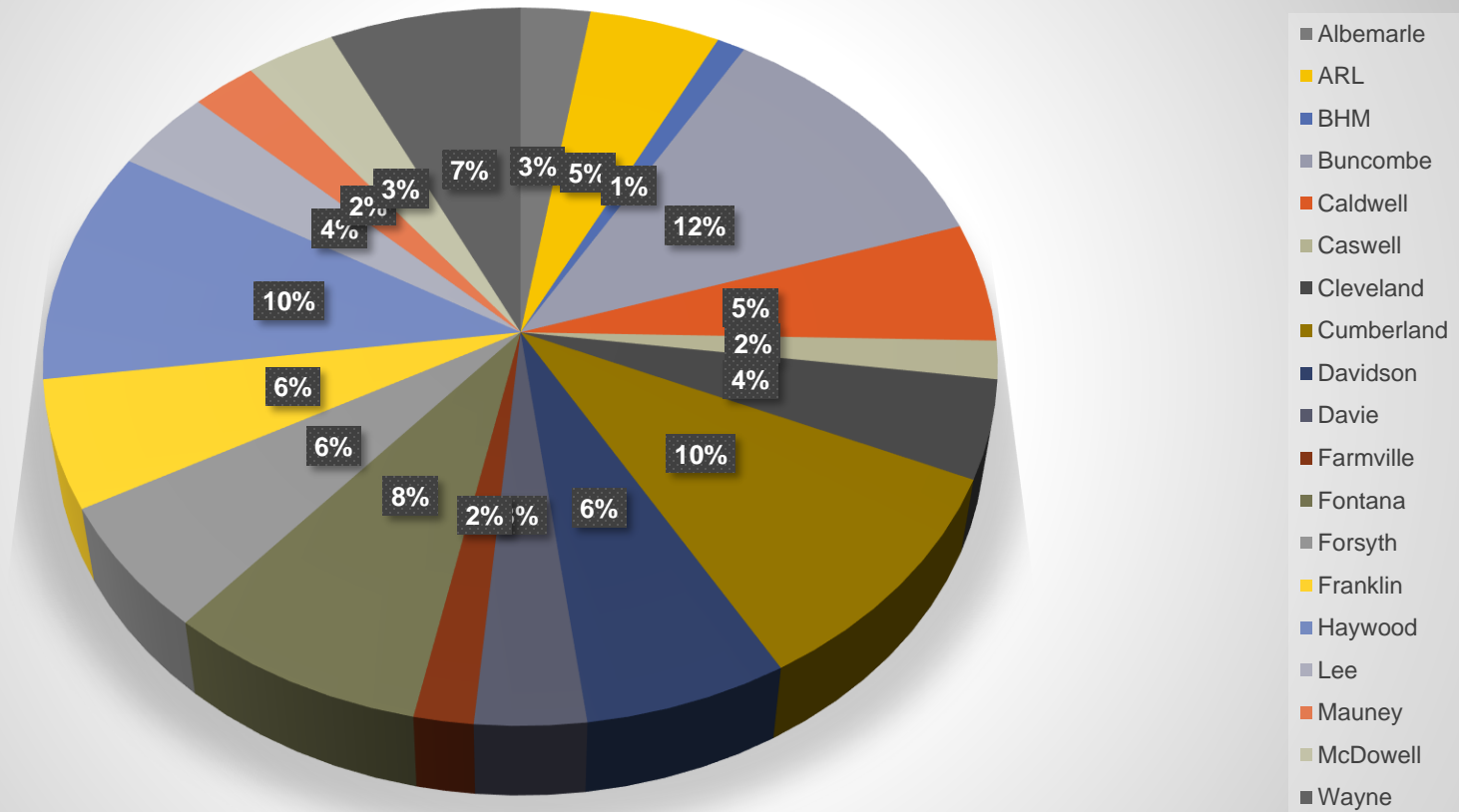
RESOURCE SHARING ISSUES

- Simplification and Standardization
  - ➢ For patrons
  - ➢ For staff
- Hold simplification
- Facilitates resource sharing

RECOMMENDATIONS

Resource Sharing

- Item base: books, audio/visual
  - ➤ Books, CDs, DVDs, Audiobooks, Blu-rays, and related AV materials

- Item minimum and limit
  - ➤ seven (7) hold requests and seven (7) circs per audiovisual type.

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RECOMMENDATION 1

Consortium members agree to share all circulating books, music CDs, audiobooks, dvds, blu-rays and related audiovisual materials after expiration of the 6-month age hold protection.

RECOMMENDATION 2

Members agree to honor a minimum number of seven (7) hold requests and seven (7) circulations per audiovisual item type.

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RECOMMENDATIONS

PROS	CONS
Facilitates resource sharing	Packaging concerns
OPAC consistency for patrons and staff	Staff time Commitment
Simplifies Hold Policy Configurations	Costs

RECOMMENDATIONS

DISCUSSION

How would this affect you?

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FY2015-16

Cataloging Committee

- Expansion of Best Practices Manual
- Continuation: Deduplication project
- Implement Recommendations
- Creation of individual cataloging staff accounts

ISSUES

- Catalog quality
- Duplicate records
- Searching
- Display of records (non-display)
- Deduplication project complications

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RECOMMENDATION

Standardize

- Circulation Modifiers
  - Consortium

- Shelving Locations
  - Consortium
  - System
  - Branch

RECOMMENDATIONS

Affects

- Hold policies
- Circulation policies
- Reports
- Cataloging

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RECOMMENDATIONS

PROS	CONS
Performance	Additional staff commitment in terms of time
Standardization	
Minimizes de-duplication issues	
Facilitates resource sharing	

RECOMMENDATION

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RECOMMENDATIONS

Implement similar to "migrating library" project; Managed as project; Shae Tetterton

- Farmville
- Cumberland
- Davie
- Appalachian

DISCUSSION

How would this affect you?

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SAME ISSUES...

- Catalog quality
- Duplicate records
- Searching
- Display of records (non-display)
- Deduplication project complications

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PROPOSAL

Members agree to implement a Cataloging Certification Assessment program.

PROPOSAL

Certification – Strategies

- Centralize cataloging: lose privileges
- ✓ Certification program
- Quality control person

PROPOSAL: CERTIFICATION

- One-day training
- Focus on NC Cardinal policies, procedures, best practices
- Assessment (online, self-paced)

PROPOSAL: CERTIFICATION

Existing Catalogers
- "Place Out"
- Take training
- Mentor Program

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RECOMMENDATIONS

PROS	CONS
Standardization	Additional staff time commitment
Minimize duplicate and mis-cataloged records	
Patron searching improvements	
Facilitate resource sharing	

7/25/2022

DISCUSSION

How would this affect you?

THANK YOU!