SLNC

NC Research.
Library Support.
Talking Books.

NC Cardinal

Where We've Been and
Where We're Going

INSTITUTE of
Museumand**Library**
SERVICES

What Has Happened Since Our Last Strategic Plan in 2016?

Growth   SLAMs   Basecamp   OPAC Updates

Knowledge Books   Authority Control   Governance

Best Practices   Web Client   Mobius   Funding Model

Assessments   Staffing Changes   Articulate

Committees   Clean Up & Consolidation

(Relevant elements of the 2016 Strategic Plan will show up here)

Steady Growth

2011
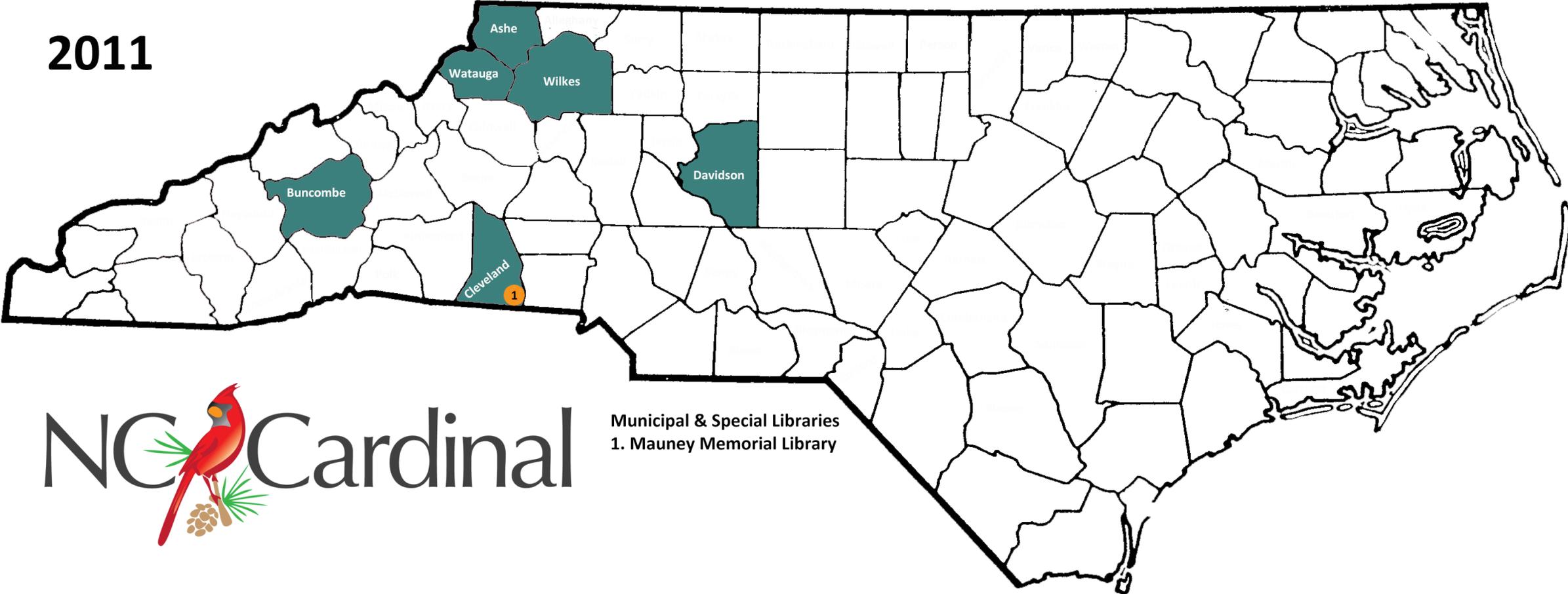
Municipal & Special Libraries
1. Mauney Memorial Library

Task 1.2: Strategically grow membership that balances new migrations into the consortium

With More Growth Comes More Work

2015: Circ Modifier Consolidation

2017: Shelving Location Consolidation

2018: Marcive Authority Control
Summon Discovery Layer

2019: Patron Permission Groups
Print Notices
Staff Permissions and Assessments

2020: Electronic Resources
Patron Purge

2021: Settings Consultations

2022: Shared Reports Clean Up
Staff Password Resets
Shelving Location Consolidation

**2023**: Holds Targeter
Orphaned Bibs

Cardinal Annual Support Ticket Activity
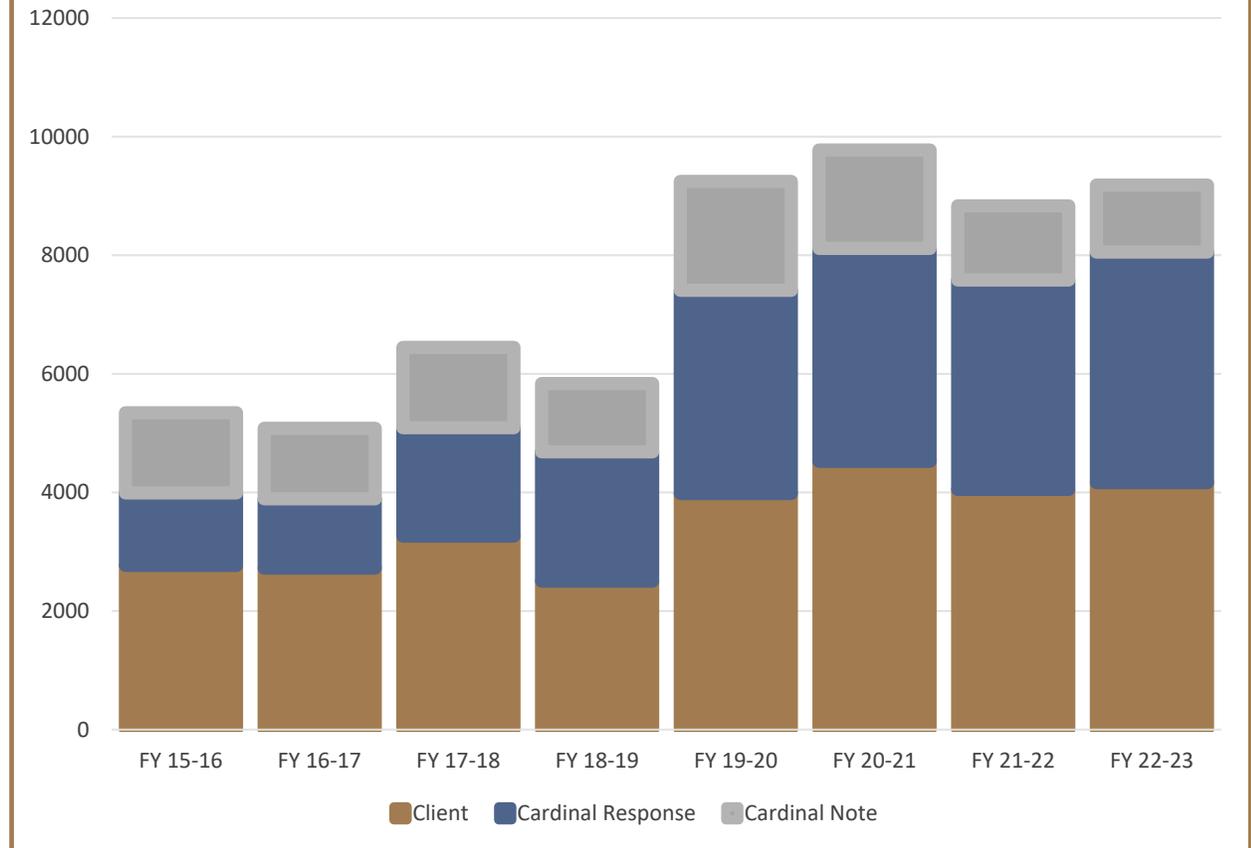
**Task 1.2: Strategically grow membership that balances new migrations into the consortium**

Staffing Changes Over the Years
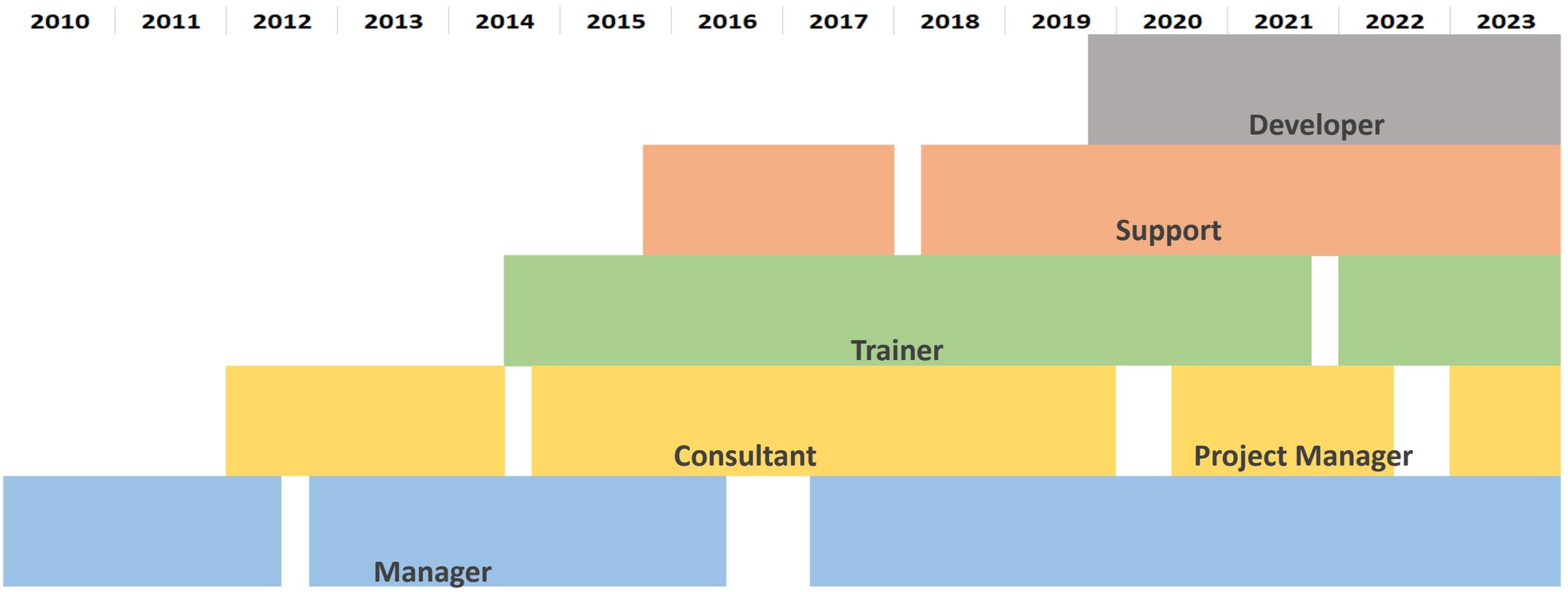
Task 1.2: Strategically grow membership that balances new migrations into the consortium

Slowing Growth but Growing Complexity

Municipal Libraries
Chapel Hill Public Library
Mooresville Public Library
High Point Public Library
Southern Pines Public Library
Hickory Public Library
Roanoke Rapids Public Library
Given Memorial Library
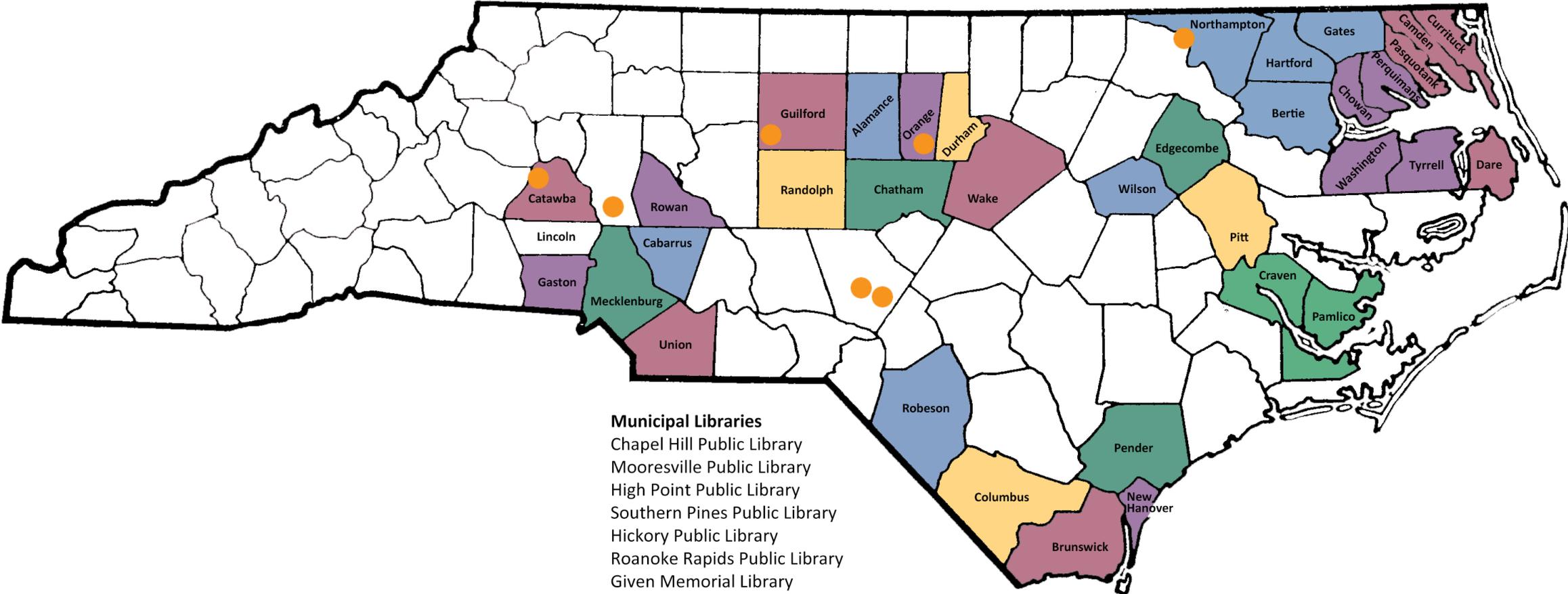
Task 1.2: Strategically grow membership that balances new migrations into the consortium

Milestones Relevant to the 2016 Strategic Plan

Move from Equinox to Mobius
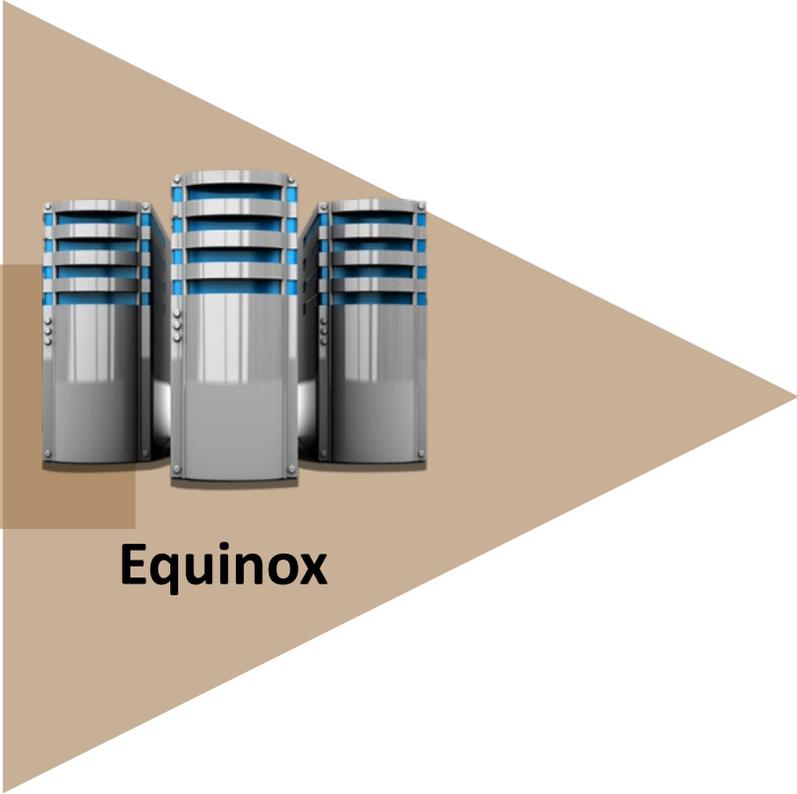
Mobius

Equinox

Task 2.1: Design (staff and patron) experiences that remove barriers, facilitate access to additional resources (e.g. eBooks), and delight users

Move from XUL to Web Client

Task 2.1: Design (staff and patron) experiences that remove barriers, facilitate access to additional resources (e.g. eBooks), and delight users

Updates to OPAC Design & Accessibility

Task 2.1: Design (staff and patron) experiences that remove barriers, facilitate access to additional resources (e.g. eBooks), and delight users

Implementation of Authority Control with Marcive

```
600 1 0  ‡a Martin, George R. R.  ‡v Television adaptations.
650   0  ‡a Kings and rulers  ‡v Drama.  ‡0 (CARDINAL)441306
650   0  ‡a Nobility  ‡v Drama.
650   0  ‡a Imaginary wars and battles  ‡v Drama.
655   7  ‡a Fantasy television programs.  ‡2 lcgft  ‡0 (CARDINAL)692390
655   7  ‡a Action and adventure television programs.  ‡2 lcgft  ‡0 (CARDINAL)34
655   7  ‡a Fiction television programs.  ‡2 lcgft  ‡0 (CARDINAL)340107
655   7  ‡a Television adaptations.  ‡2 lcgft  ‡0 (CARDINAL)340108
655   7  ‡a Television programs.  ‡2 lcgft  ‡0 (CARDINAL)305276
655   7  ‡a Television series.  ‡2 lcgft  ‡0 (CARDINAL)340104
655   7  ‡a Video recordings for the hearing impaired.  ‡2 lcgft  ‡0 (CARDINAL)34
700 1    ‡a Benioff, David,  ‡e creator,  ‡e television producer,  ‡e screenwriter.
700 1    ‡a Weiss, D. B.  ‡e creator,  ‡e television producer,  ‡e screenwriter.
700 1    ‡a Martin, George R. R.  ‡e television producer,  ‡e screenwriter.  ‡0 (CA
700 1    ‡a Gerardis, Vince,  ‡e television producer.
700 1    ‡a Vicinanza, Ralph,  ‡d 1950-2010,  ‡e television producer.
700 1    ‡a Casady, Guymon,  ‡e television producer.  ‡0 (CARDINAL)340049
700 1    ‡a Strauss, Carolyn,  ‡e television producer.
700 1    ‡a Huffam, Mark,  ‡e television producer.
700 1    ‡a Burn, Joanna,  ‡e television producer.
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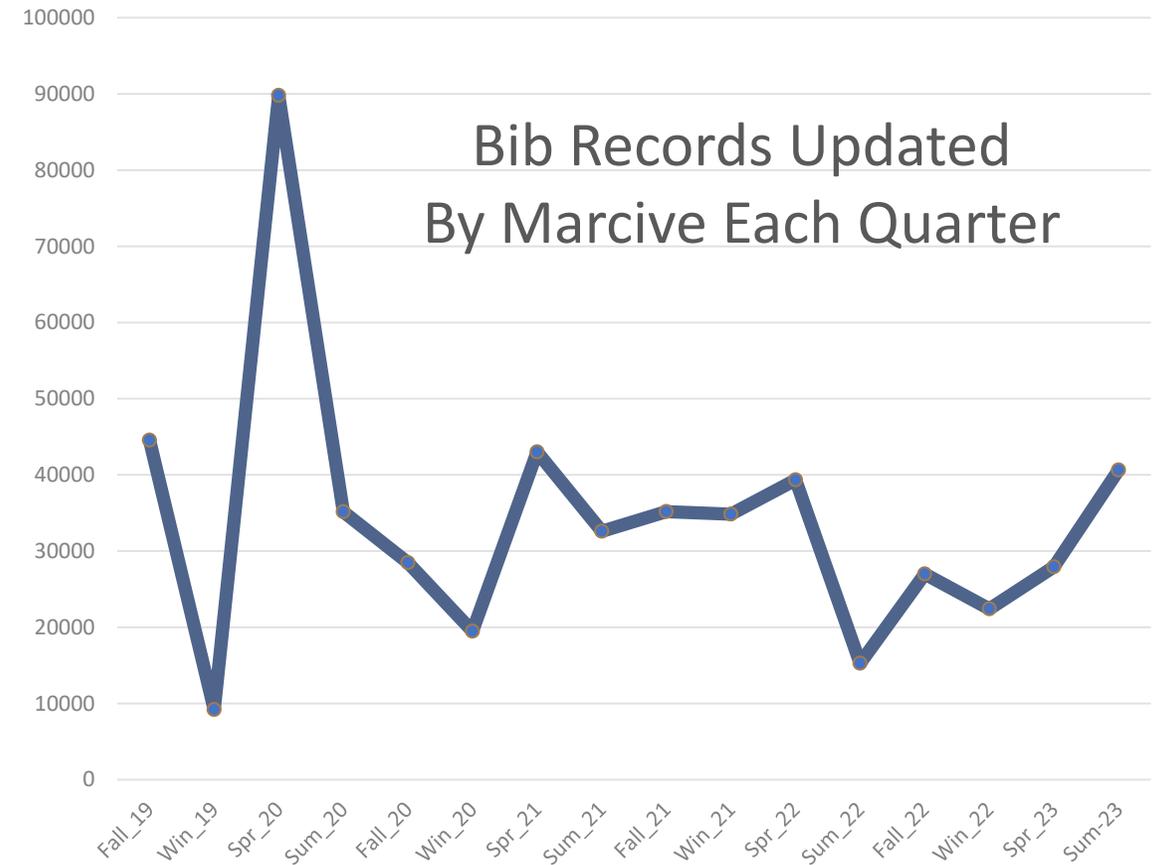
Bib Records Updated
By Marcive Each Quarter

Task 2.1: Design (staff and patron) experiences that remove barriers,
facilitate access to additional resources (e.g. eBooks), and delight users

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Additional Service Offerings

- EBSCO Novelist
- ExLibris Summon
- LibraryIQ
- LibraryHQ
- PatronPoint
- MyLibro
- Unique Management Collections
- Wowbrary
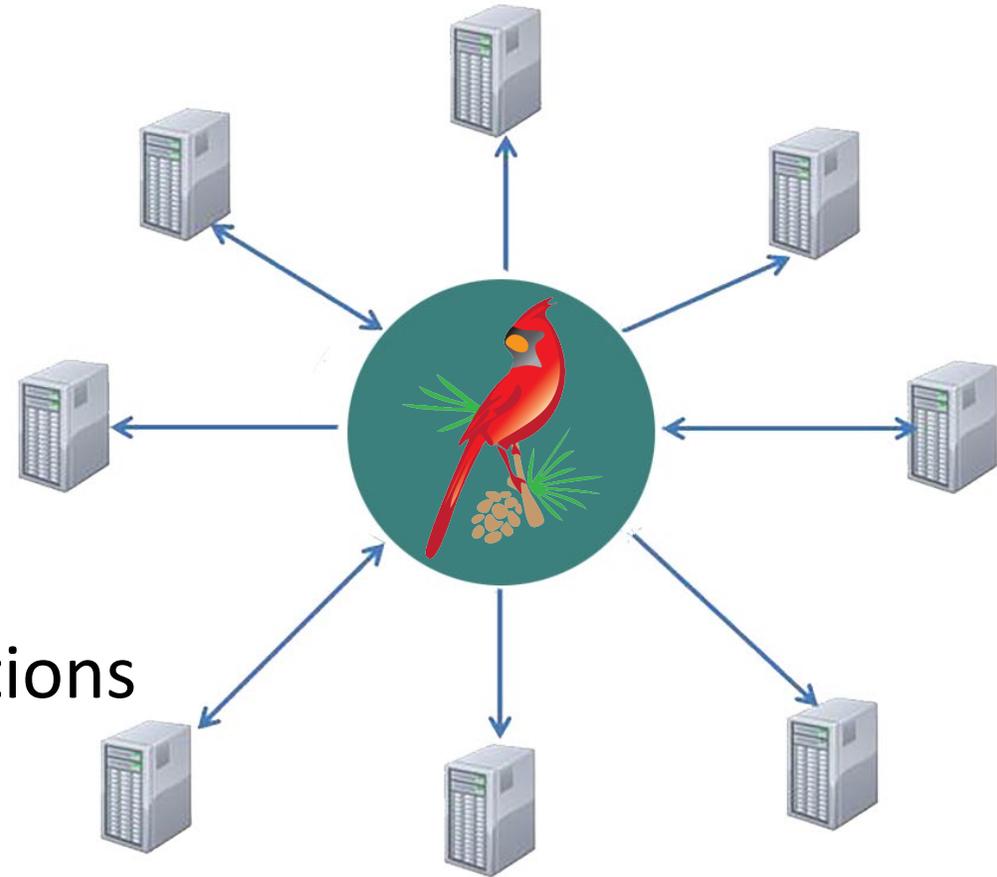
Task 2.2: Explore additional service offerings based upon member needs and interests

Knowledge Books

Acquisitions in Evergreen

This is a living document
share under the same lic

Reports in Evergreen

Documentation of the reporting

This is a living document that
share under the same license.

Administration Manual for Libraries

Instructions for utilizing the a

This is a living document that
share under the same license.

Circulation in Evergreen

This is a living document that incor
share under the same license.

Cataloging in NC Cardinal

This living document outlines and provides best practices for catal
topics arise, this document will be amended. If you have any quest

This document incorporates elements of Evergreen Documentation

**Task 3.4: Leverage expertise and best practices
by building a knowledgebase that strengthens the NC Cardinal community**

Admin Manual and SLAMs

Administration Manual for Libraries

Instructions for utilizing the administrative functions in Evergreen for NC Cardinal library admin staff.

This is a living document that incorporates many elements of Evergreen Community Documentation ↓ share under the same license.

System Access Login Manager

START COURSE

As your library's designated System Access Login Manager, you are responsible for the login accounts staff at your library will use to access the staff client on Evergreen.

This module will help you learn more about this responsibility and why it's important, how to set up accounts, how to manage accounts, and how to work with the NC Cardinal team to keep them up to date.

Task 3.5: Assess service delivery support operations and provide more self-service administration tools

Communication

- Move from Mailing Lists to Basecamp
- Niche Academy tutorials
- Webinars and YouTube content
- Annual Staff Survey

Task 3.7: Continue to build communication channels and training experiences and resources for membership and staff

Community Engagement and Partnerships

Task 4.3: Develop additional opportunities for member and NC Cardinal staff to participate in the Evergreen and open source communities

Task 5.1: Form collaborative partnerships that increase benefit to member libraries and their communities, leveraging public investment in libraries

Task 5.2: Build strategic alliances with service providers and other consortia to increase awareness of services available and fluidity in service delivery to public libraries

Resource Sharing Improvements
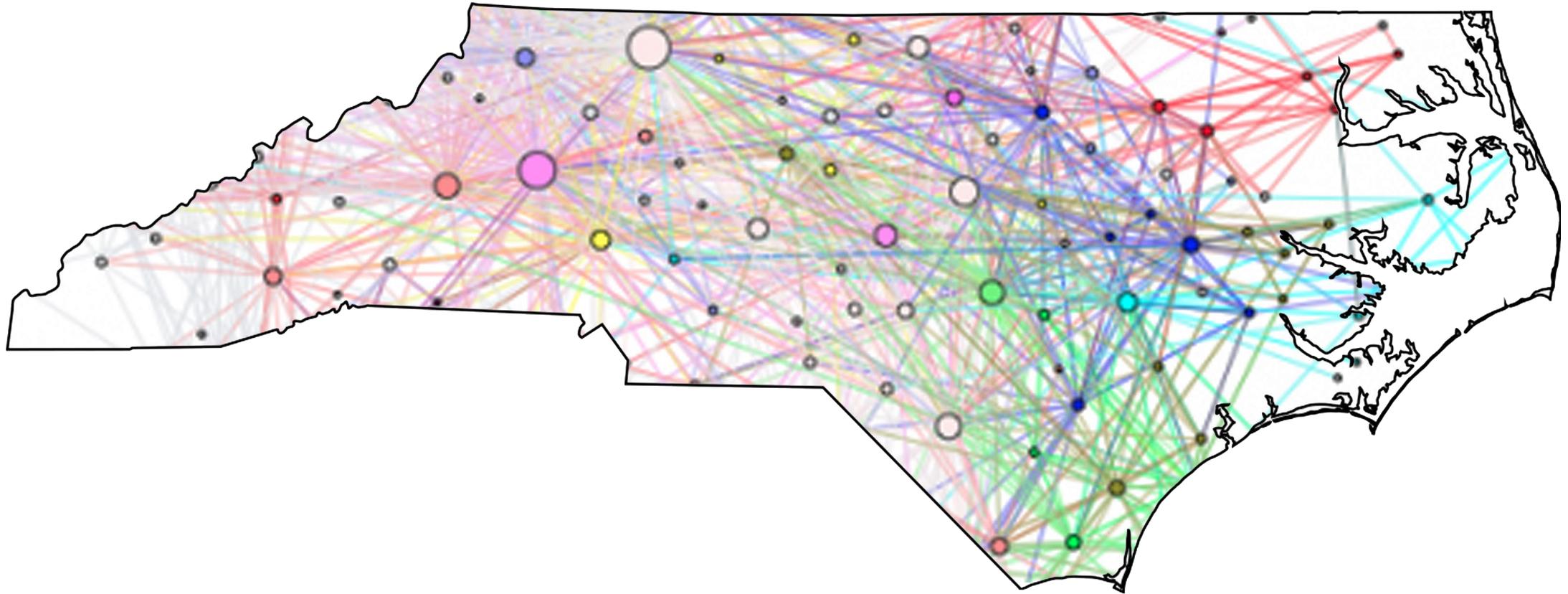
Task 3.8: Refine resource sharing operations and practices to optimize cost and benefit

Changes to Funding Model

Resource Sharing Costs versus Member Contributions

Legend:
- Member Contributions
- Resource Sharing

Member Contributions:
- FY 14-15: $203,500
- FY 15-16: $177,975
- FY 16-17: $201,874
- FY 17-18: $217,482
- FY 18-19: $241,315
- FY 19-20: $233,065
- FY 20-21: $270,401
- FY 21-22: $318,256
- FY 22-23: $364,805
- FY 23-24: $406,821
- FY 24-25: $460,804
- FY 25-26: $497,897

Resource Sharing:
- FY 17-18: $357,916
- FY 18-19: $395,925
- FY 19-20: $377,159
- FY 20-21: $505,600
- FY 21-22: $696,287
- FY 22-23: $899,657
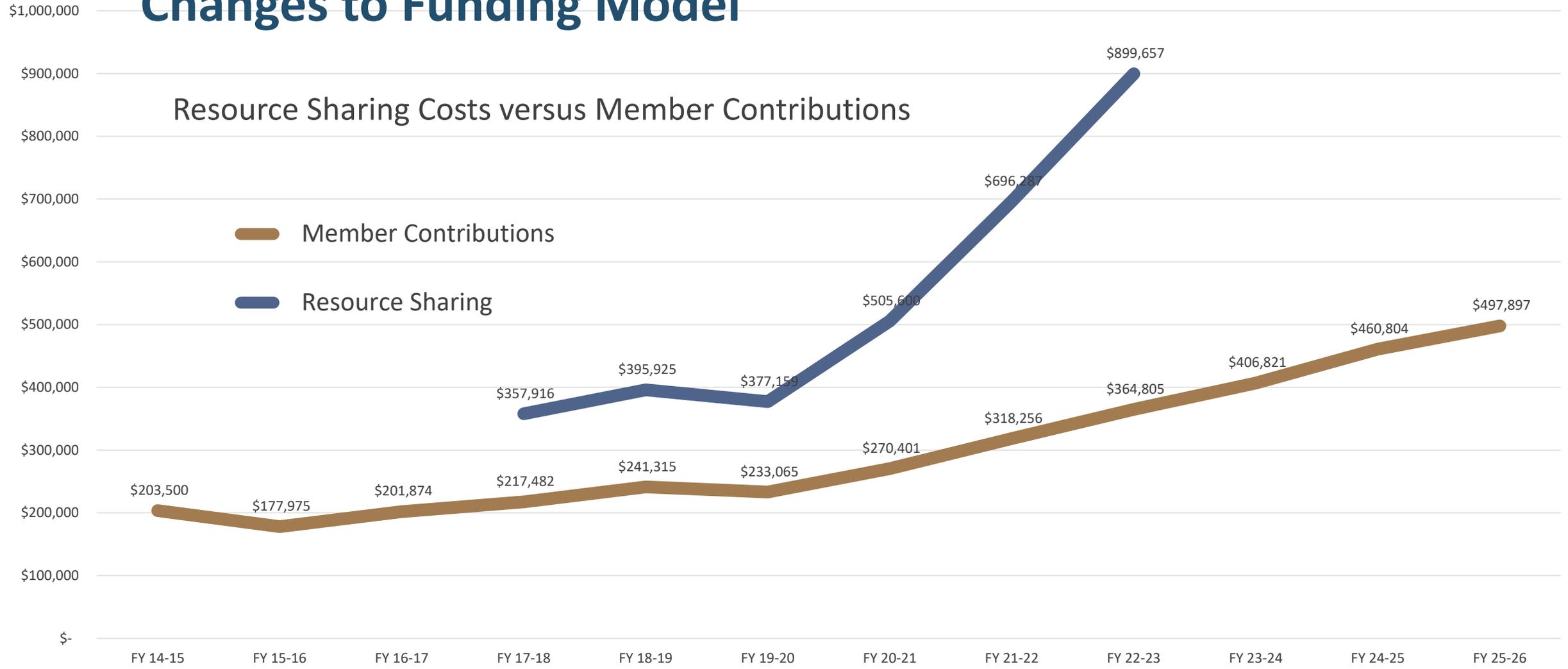
Task 3.3: Build an operational and funding model that incrementally creates organizational self-sustainability

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Governance

Task 3.2: Expand governance capacity by diversifying the committee and convening advisory forums

Developing Policies and Best Practices
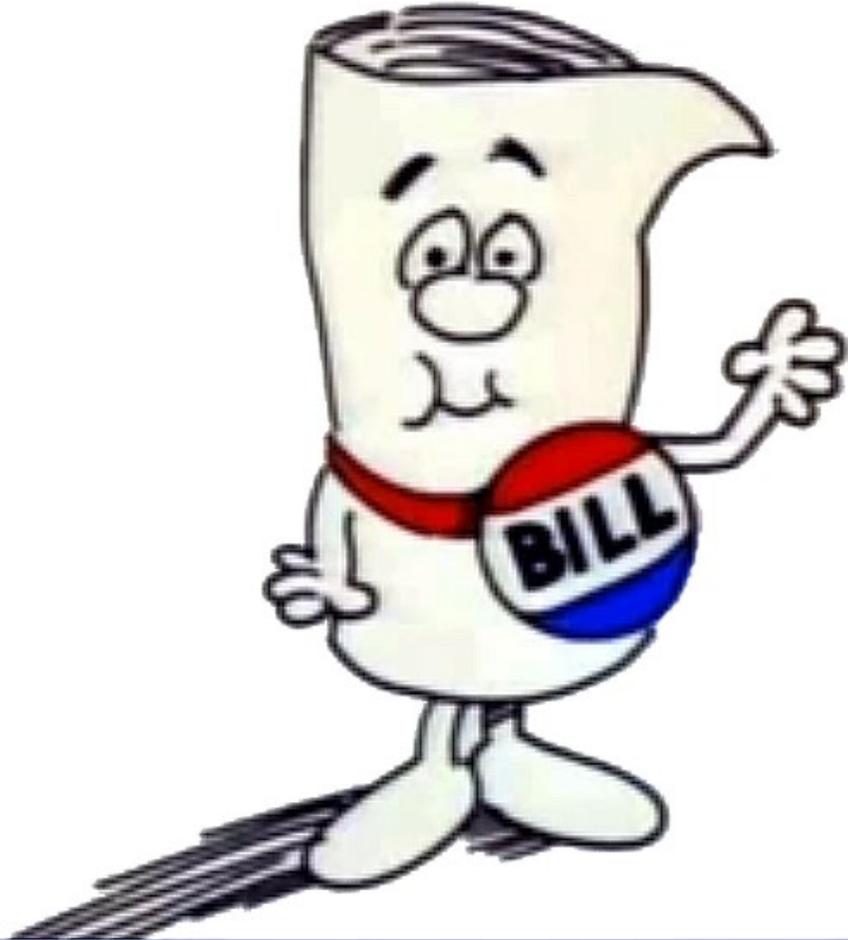
2.1. Resource Sharing Best Practices

Policies and Procedures
General Policies

- Circulations will follow the policy of the library where they are checked out at, regardless of whether the
- When thinking of Cardinal resource sharing, it is important to remember that an NC Cardinal patron is a
- Holds may be placed on books, videos, audiobooks and music from any NC Cardinal library. Each libra never holdable or 2) non-holdable for a specific length of time, for example, six months.
- If a patron presents the on-hold item for checkout before it is retrieved for the requesting hold patron, th house patron. The requesting hold patron will remain in line for the item. Patrons whose NC Cardinal ca
- If you would like to put something on hold for one of your Staff or Outreach accounts that have a longer
- If one of your patrons lost an item that was borrowed through resource sharing, it is best to check with t of your patrons loses an item borrowed through resource sharing. You may wish to refer to this page for instructions are provided. If a patron replaces a lost or damaged item with an exact copy (same ISBN), the patron to keep the damaged copy.
- It is always preferable to put the patron in contact with the owning library so they can pay that library dir damaged or lost item owned by another system.
- Patrons may return any borrowed item to any member library for transit back to the owning library.

**Task 4.1: Formalize existing committees and create new committees
to address standard practices and policies as well as user interfaces and patron experiences**

Where do we grow from here?

Growth   SLAMs   Basecamp   OPAC Updates

Knowledge Books   Authority Control   Governance

Best Practices   Web Client   Mobius   Funding Model

Assessments   Staffing Changes   Articulate

Committees   Clean Up & Consolidation

Communication within Cardinal

Cardinal policy making processes

Supporting staff using Evergreen

Service to members of the public