2018 ANNUAL MEETING

NC CARDINAL

6th ANNUAL MEETING | August 2, 2018

1

Welcome!

Agenda

Year In Review: FY 2017-2018

Committee & Working Group Updates

- **Cataloging Committee**
- **Authorities Working Group**
- **Resource Sharing / User Experience Committee**

Public Library Stats for NC Cardinal

Annual Survey Results

The Year Ahead: FY 2018-2019

Bylaw Update Vote

Lunch

Patron Permissions Discussion

Strategic Plan Review

Year In Review

Personnel Changes

Courtney Brown

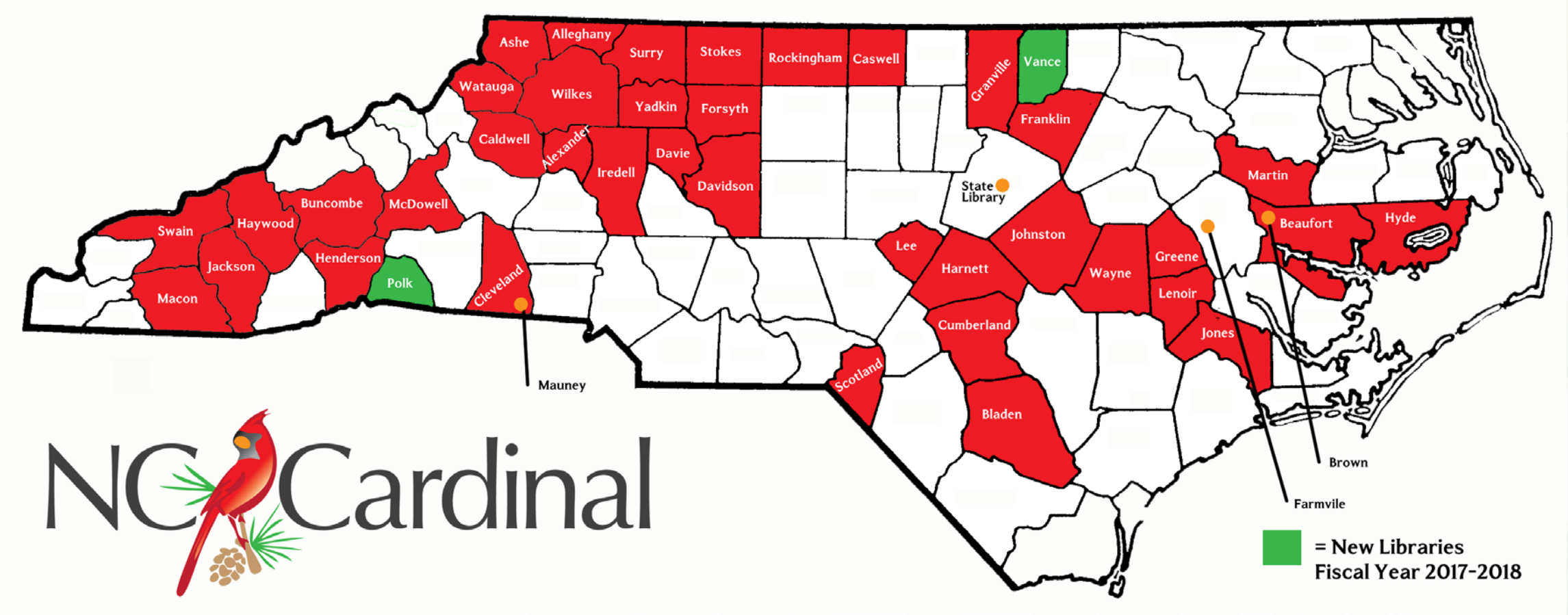
NC Cardinal Systems Librarian

...

NC Cardinal Systems Administrator

Year In Review

FY 2017-2018



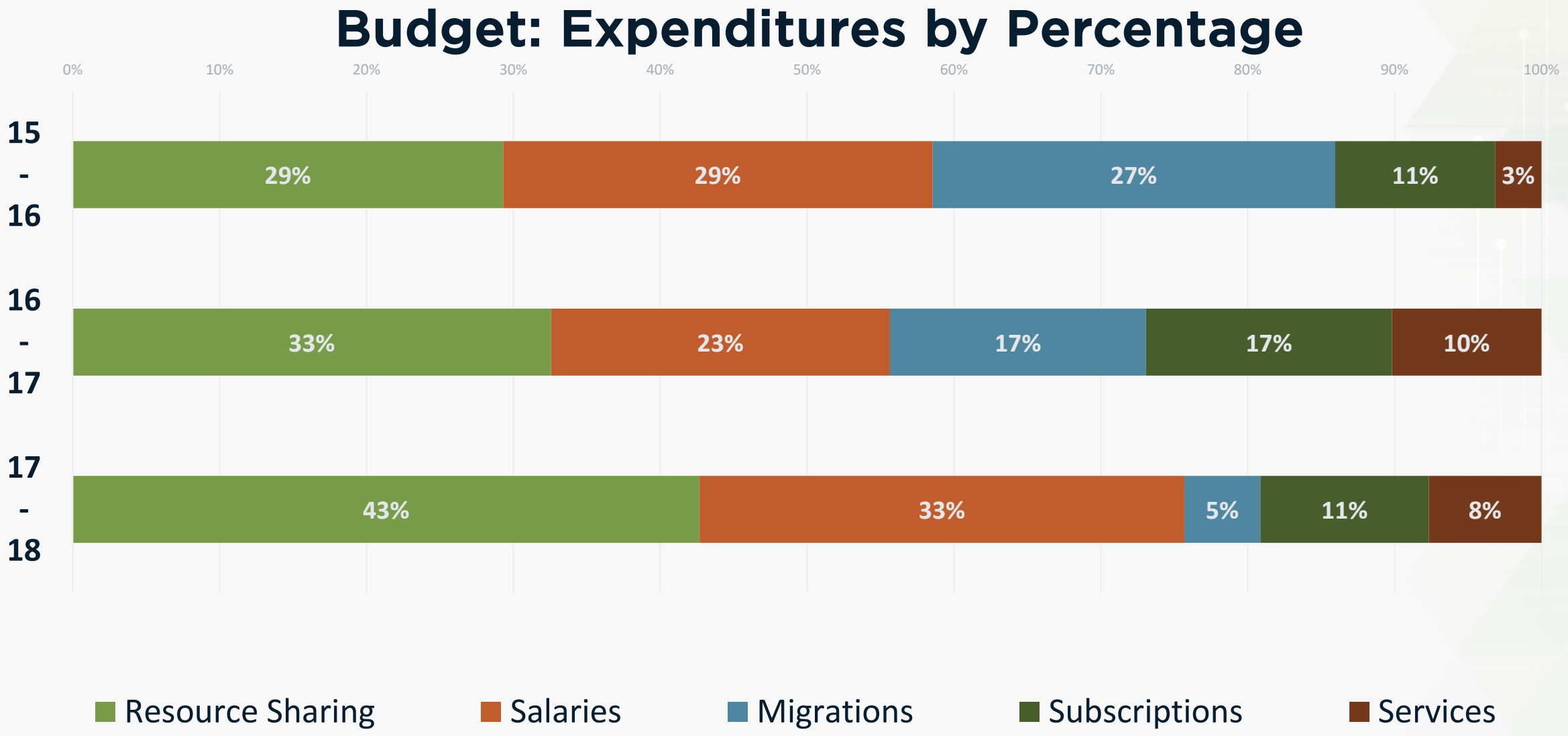
NC Cardinal

38 counties, 3 municipalities, 7 Special Libraries
147 branches

40 counties, 3 municipalities, 7 Special Libraries
150 branches (Out of 407 total)

Year In Review

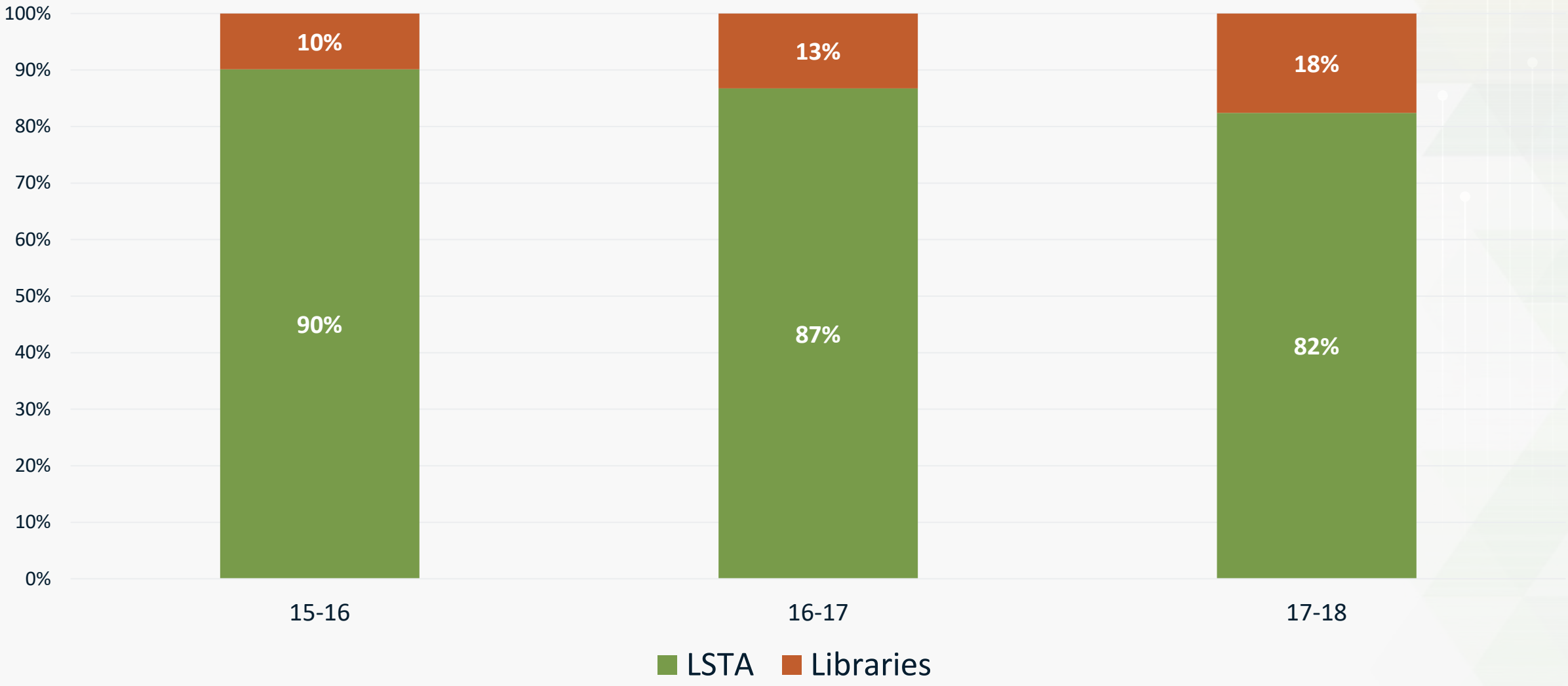
FY 2017-2018



Year In Review

Source of Funding

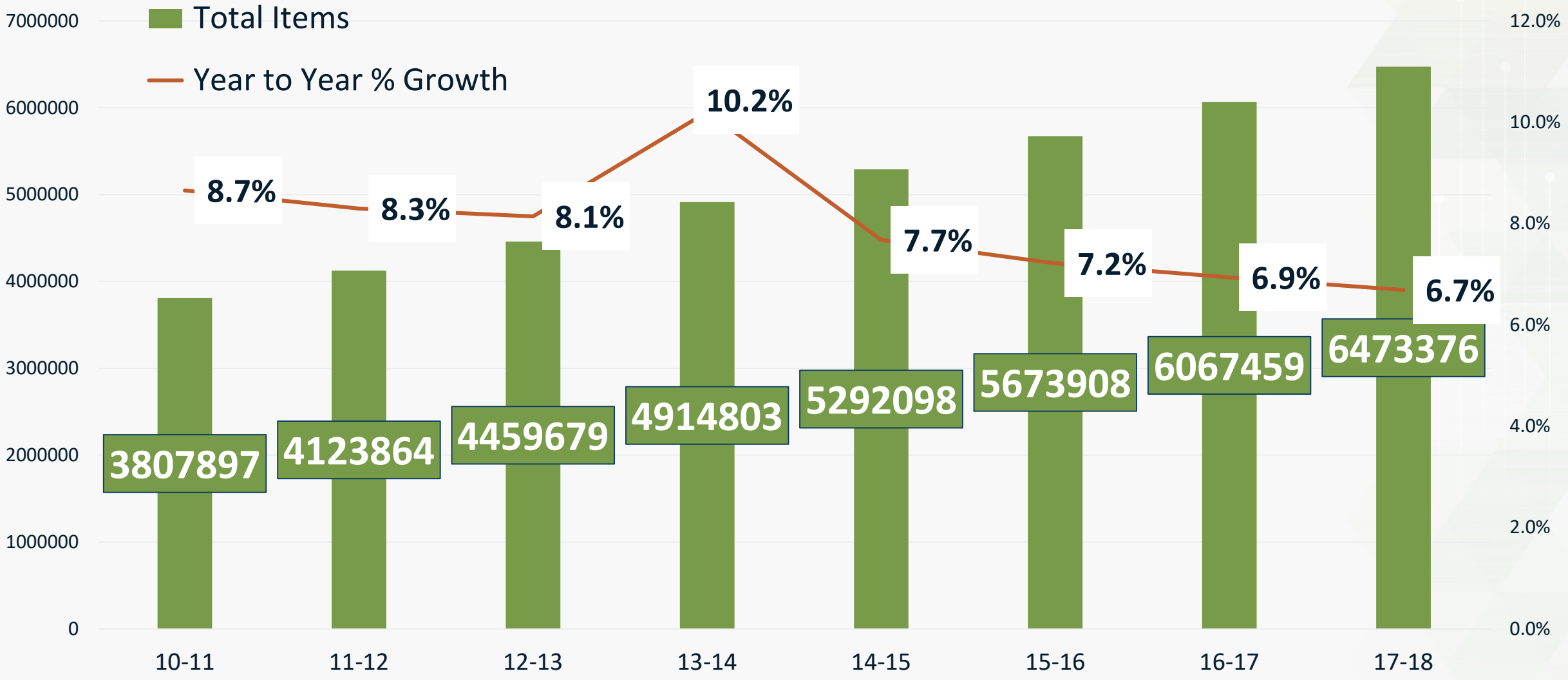
FY 2017-2018



Year In Review

FY 2017-2018

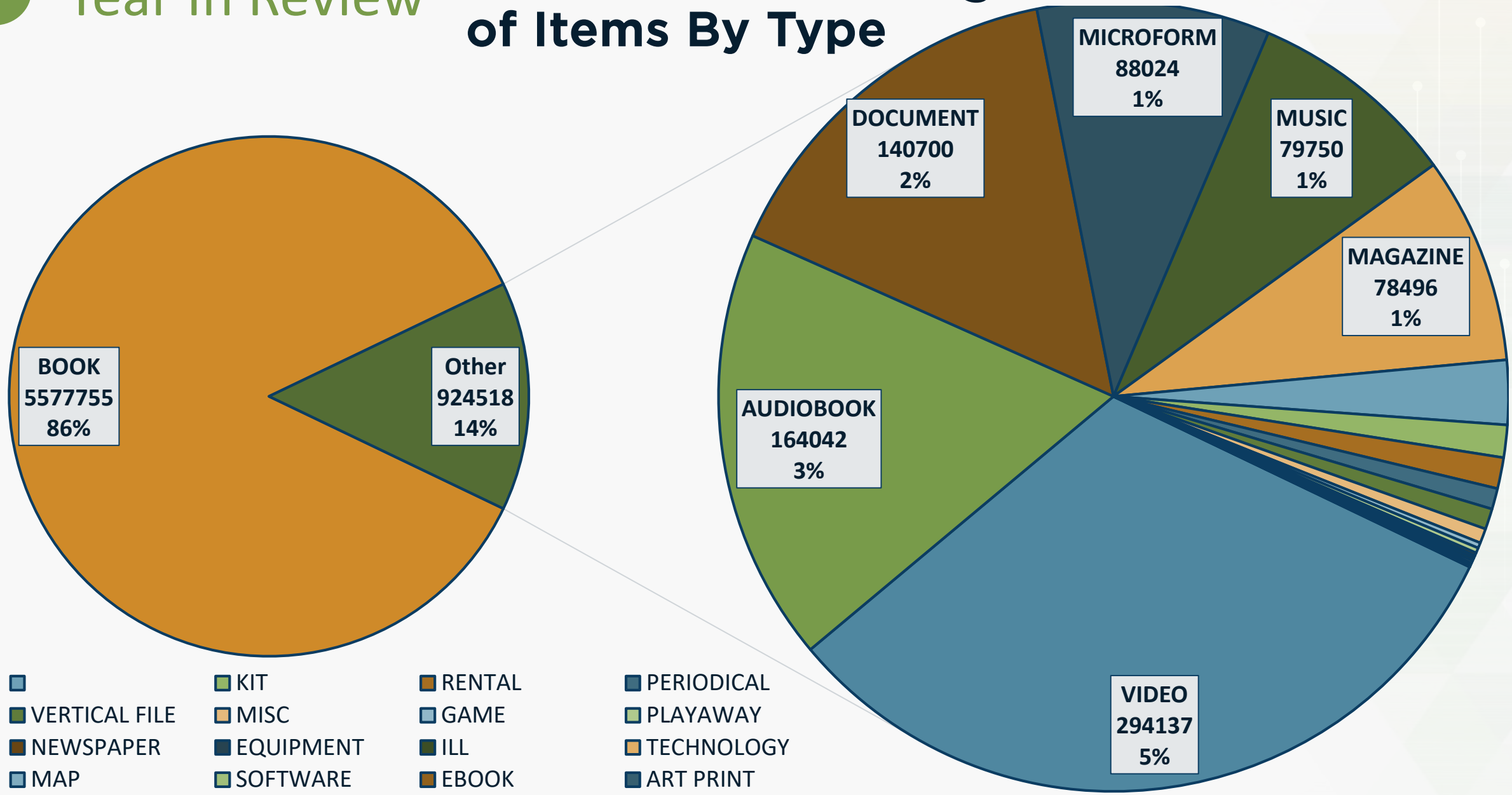
Collection Growth



Year In Review

Count and Percentage of Items By Type

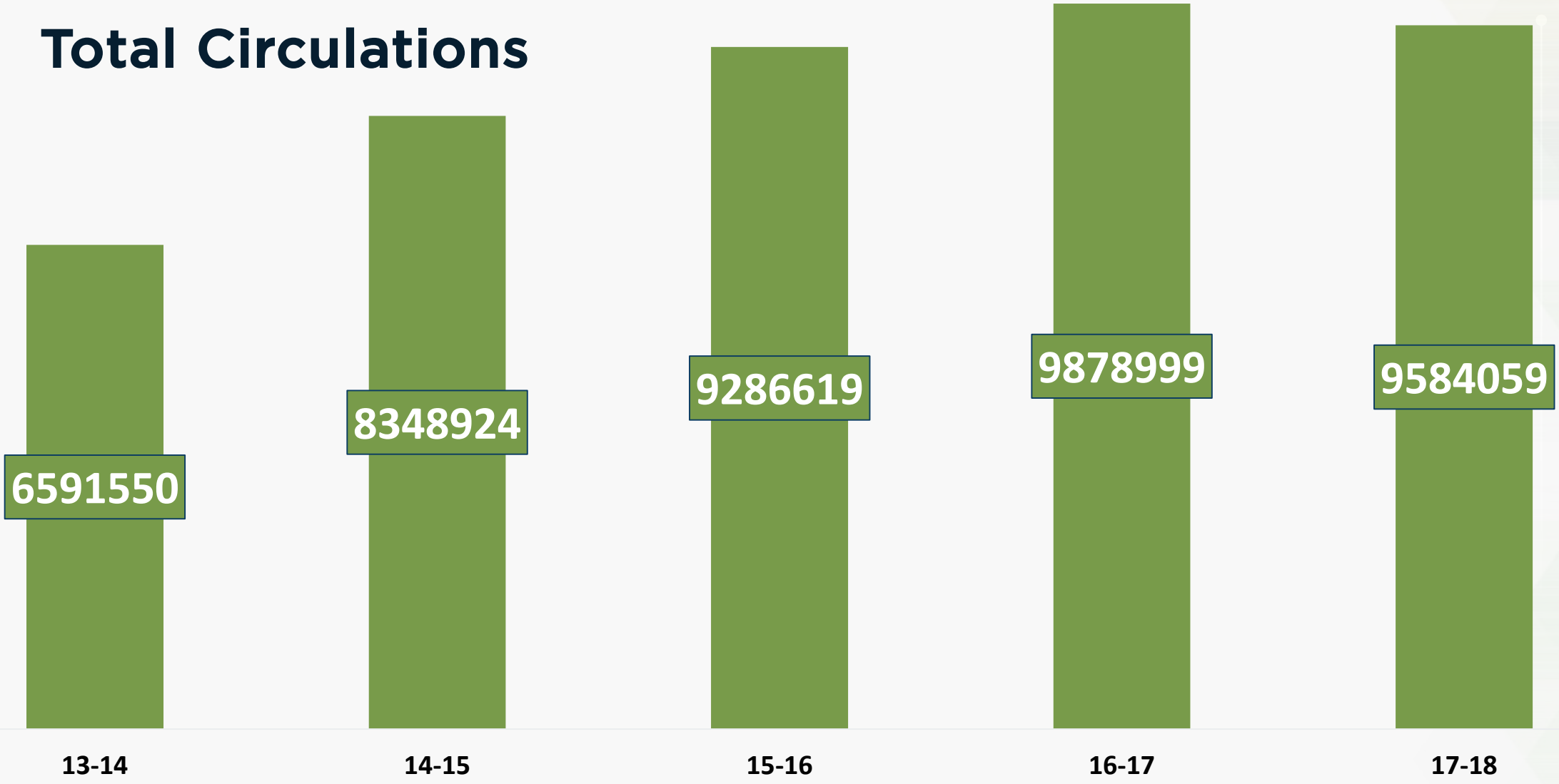
FY 2017-2018



Year In Review

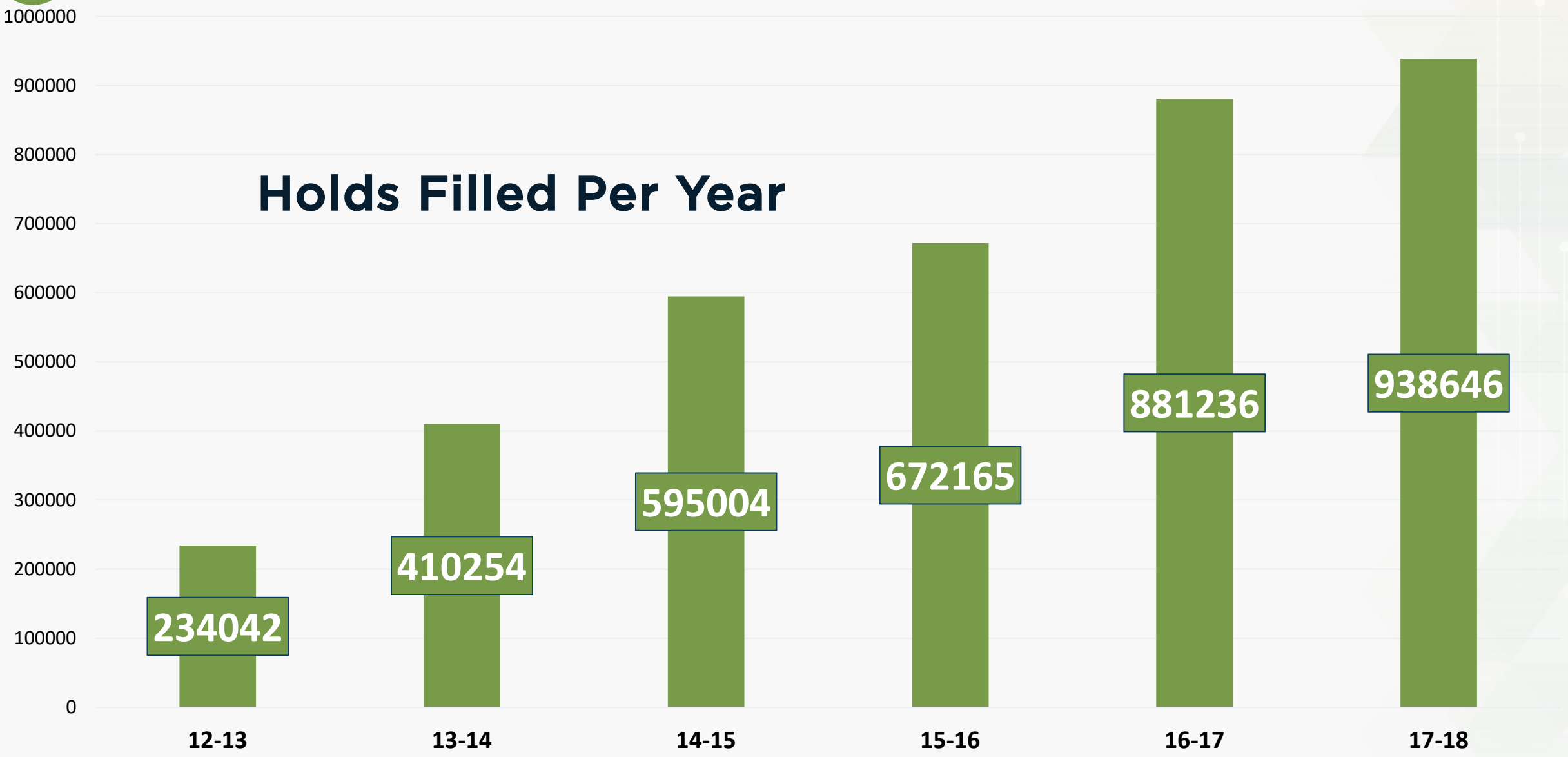
FY 2017-2018

Total Circulations



Year In Review

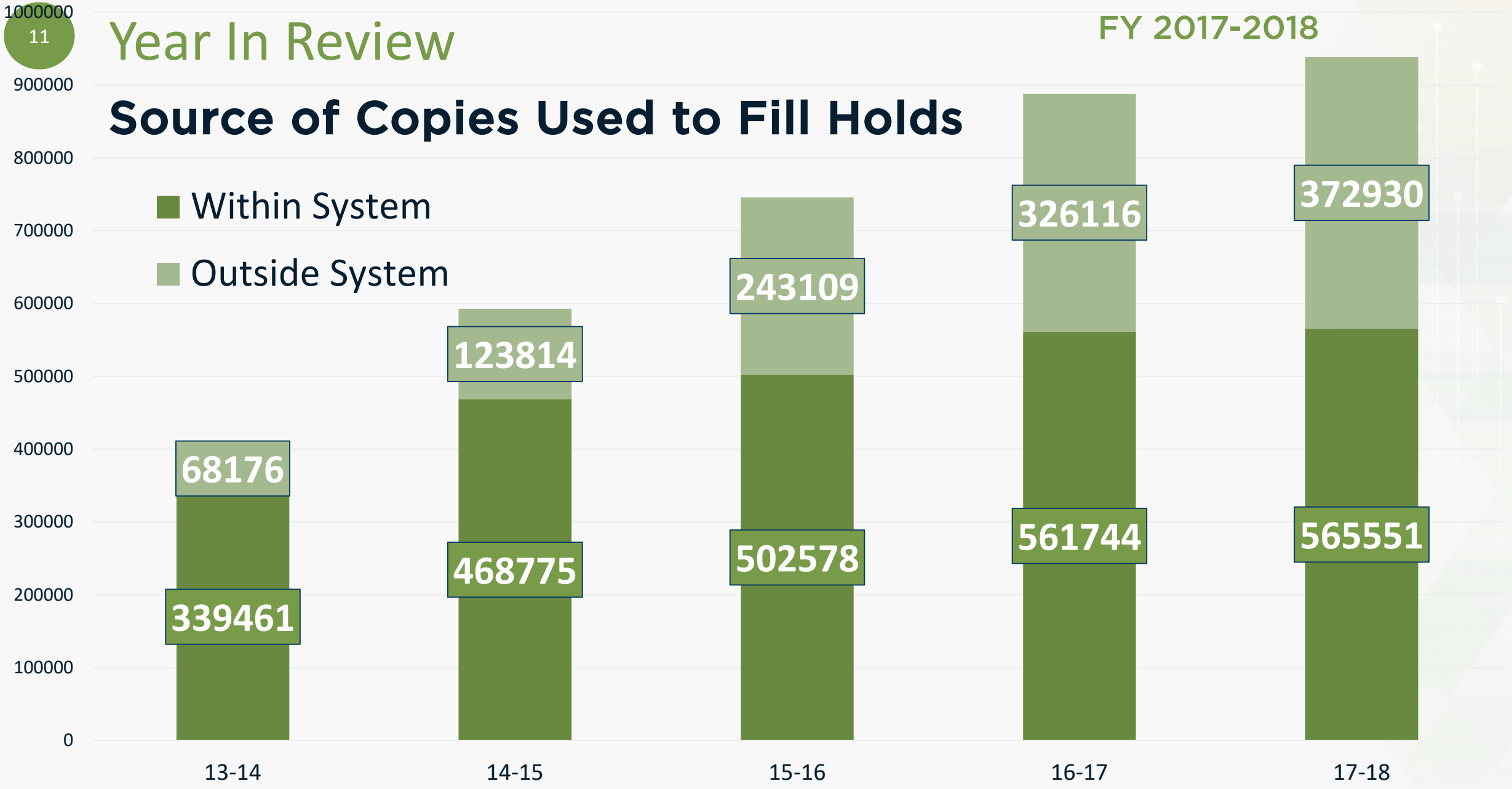
FY 2017-2018



Year In Review

FY 2017-2018

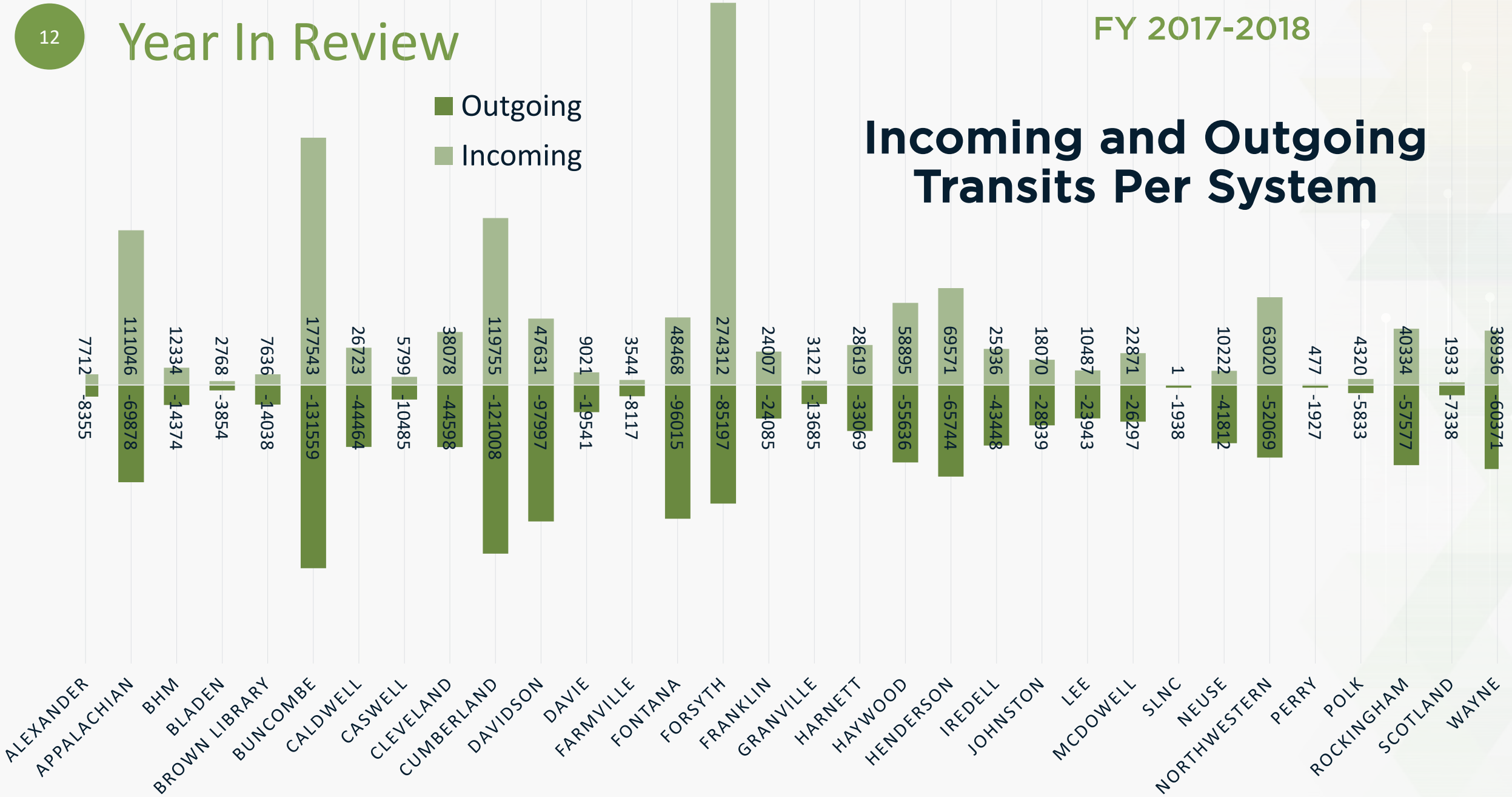
Source of Copies Used to Fill Holds



Year In Review

FY 2017-2018

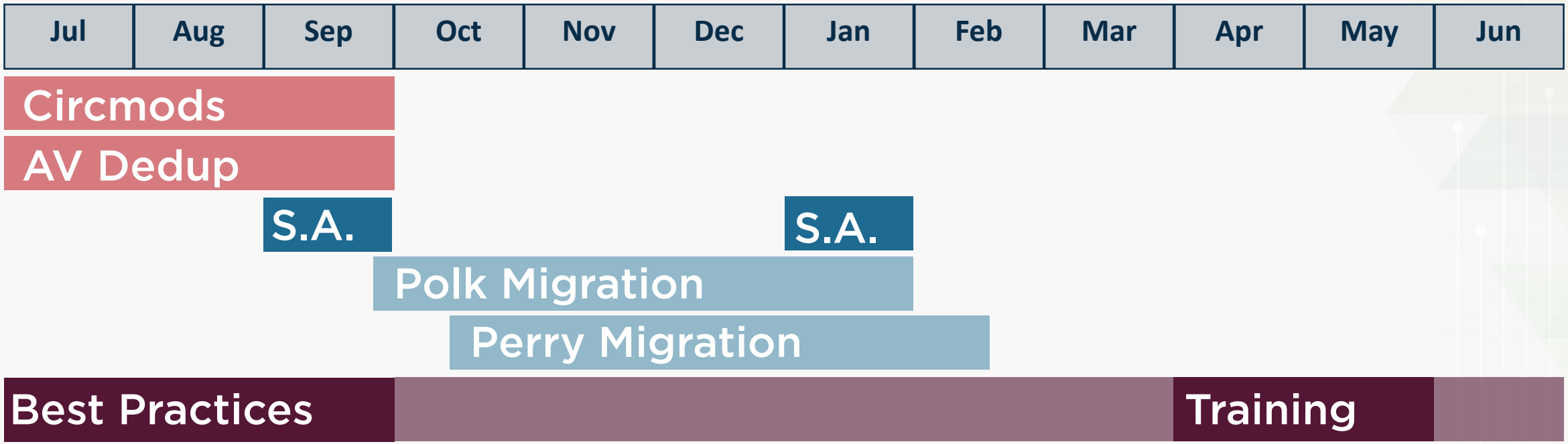
Incoming and Outgoing Transits Per System



Projects

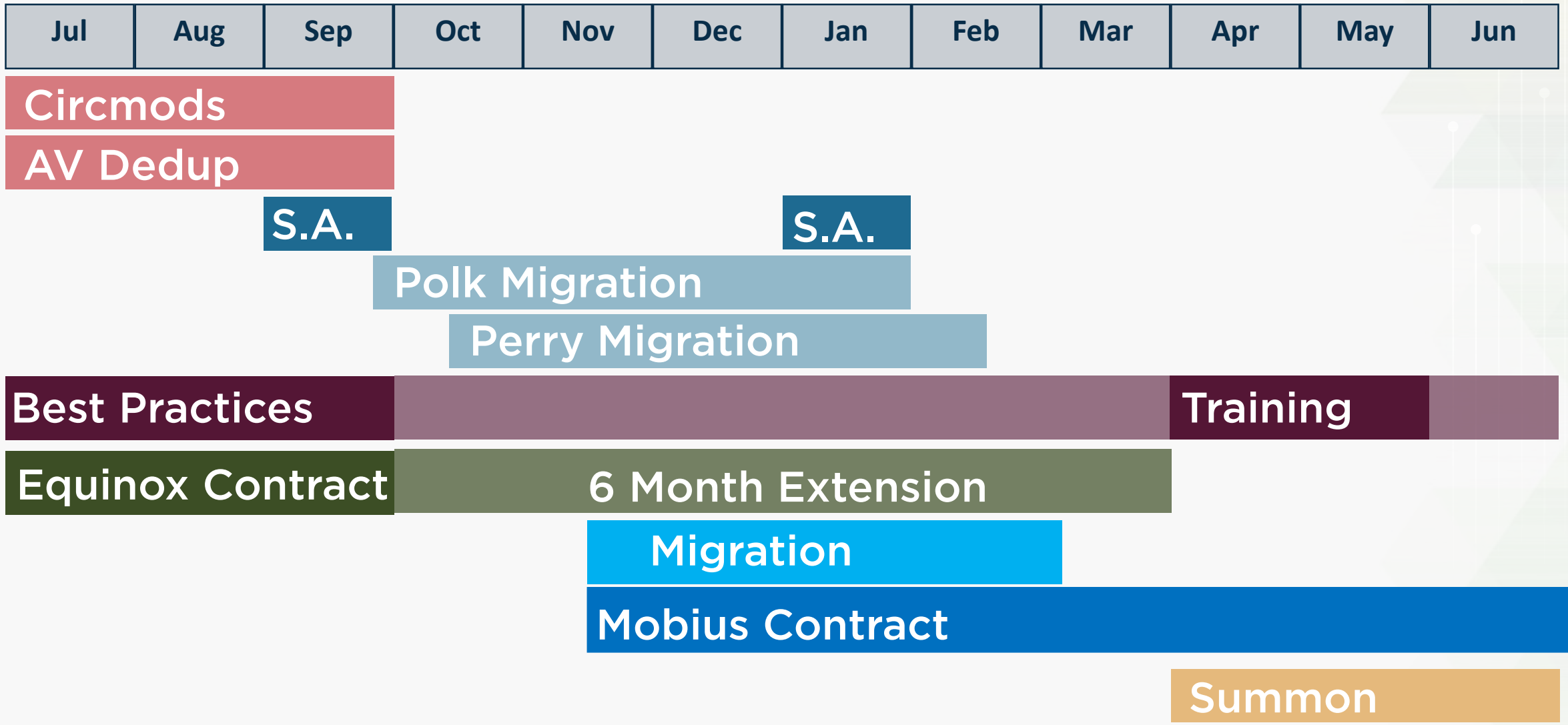
Year In Review

Project Schedule FY 2017-2018



Year In Review

Project Schedule FY 2017-2018

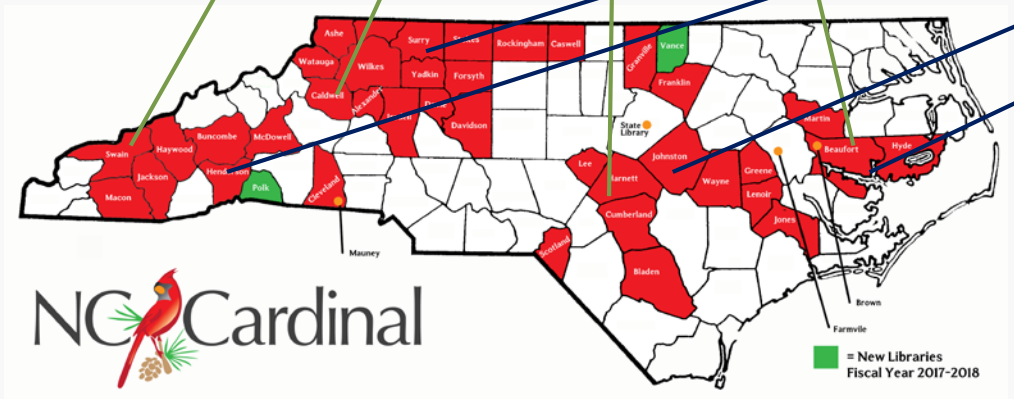


Equinox Servers

Mobius Servers

_____.nccardinal.org

dev_____.nccardinal.org



* This was a slide from one of our migration webinars

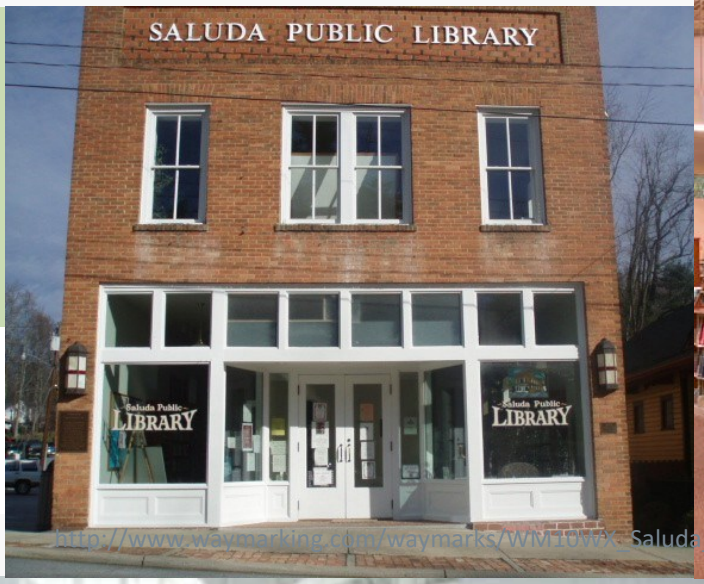
Migration to Mobius

Year In Review

New Member Libraries

Polk County Public Libraries

Perry Memorial Public Library



http://www.waymarking.com/waymarks/WM1DW9_Saluda_Public_Library_Polk_County_NC

https://www.adwarchitects.com/civic-polk-county-public-library/

https://goo.gl/maps/tbSWy5m9XPy

BUNCOMBE COUNTY
NORTH CAROLINA

cardinal

New Search Advanced

0

3,377,799 results sorted by relevance

Add results beyond your library's collection

REFINE YOUR SEARCH

Full Text Online

Scholarly & Peer-Review

CONTENT TYPE

Newspaper Article (3,113,774)

Journal Article (100,274)

Magazine Article (67,523)

Book Review (22,936)

Book / eBook (13,634)

More...

PUBLICATION DATE

from to

Last 12 Months
Last 3 years
Last 5 years

1

Cardinals
by Mara, Wil

Backyard safari, 2015, First edition.

Book: Available, J598.883 M, Bordeaux Library (+8 More)

Preview

2

Cardinals
by Murray, Julie

A buddy book, 2002

Describes the physical characteristics, behavior, and habitat of **cardinals**.

Book: Available, J598.883 MUR, Fairview Library (+1 More)

Preview

3

Cardinals
by Merrick, Patrick

Nature books, 2000

Describes the physical characteristics, behavior, habitat, and life cycle of **cardinals**.

From Wikipedia, the free encyclopedia

Cardinal (Bird)

Cardinals, which make up the family Cardinalidae, are passerine birds found in North and South America. They are also known as cardinal-grosbeaks and cardinal-buntings. The South American cardinals in the genus "Paroaria" are placed in another family, the Thraupidae (previously placed in Emberizidae).

Read more

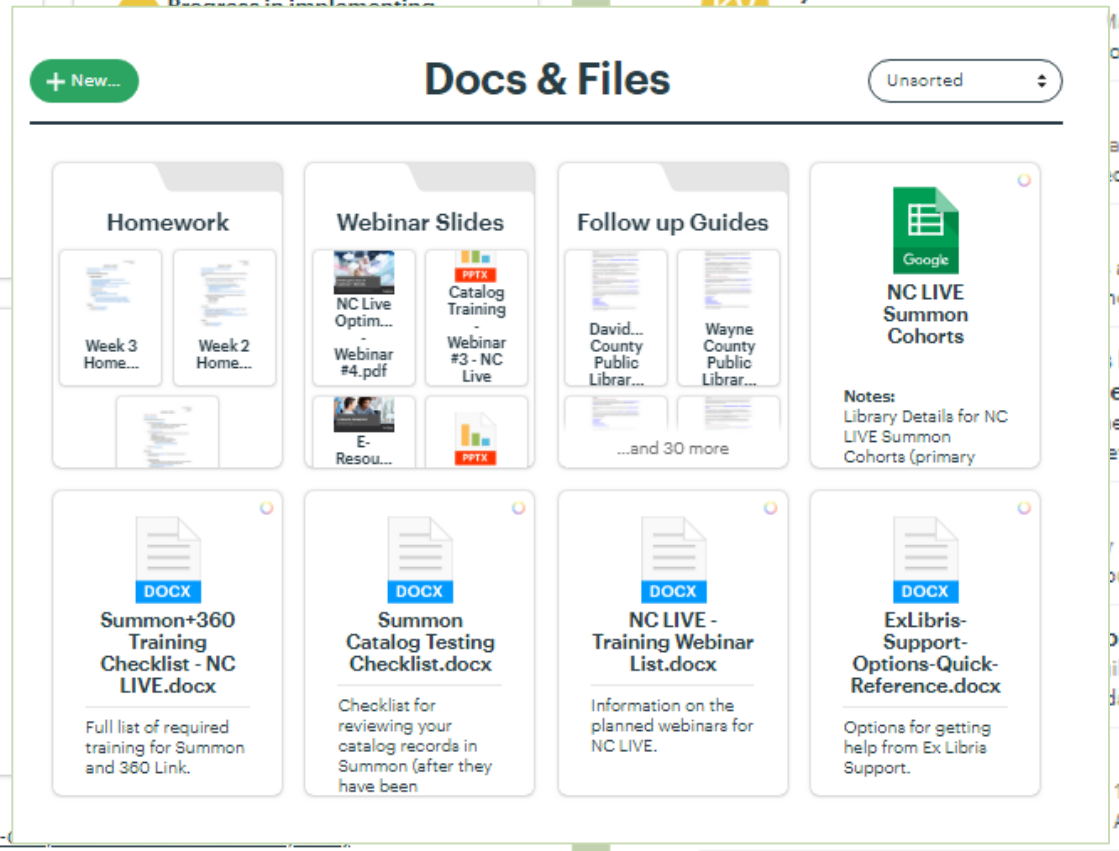
Related Topics

Bird
Passer
Monarch butterfly

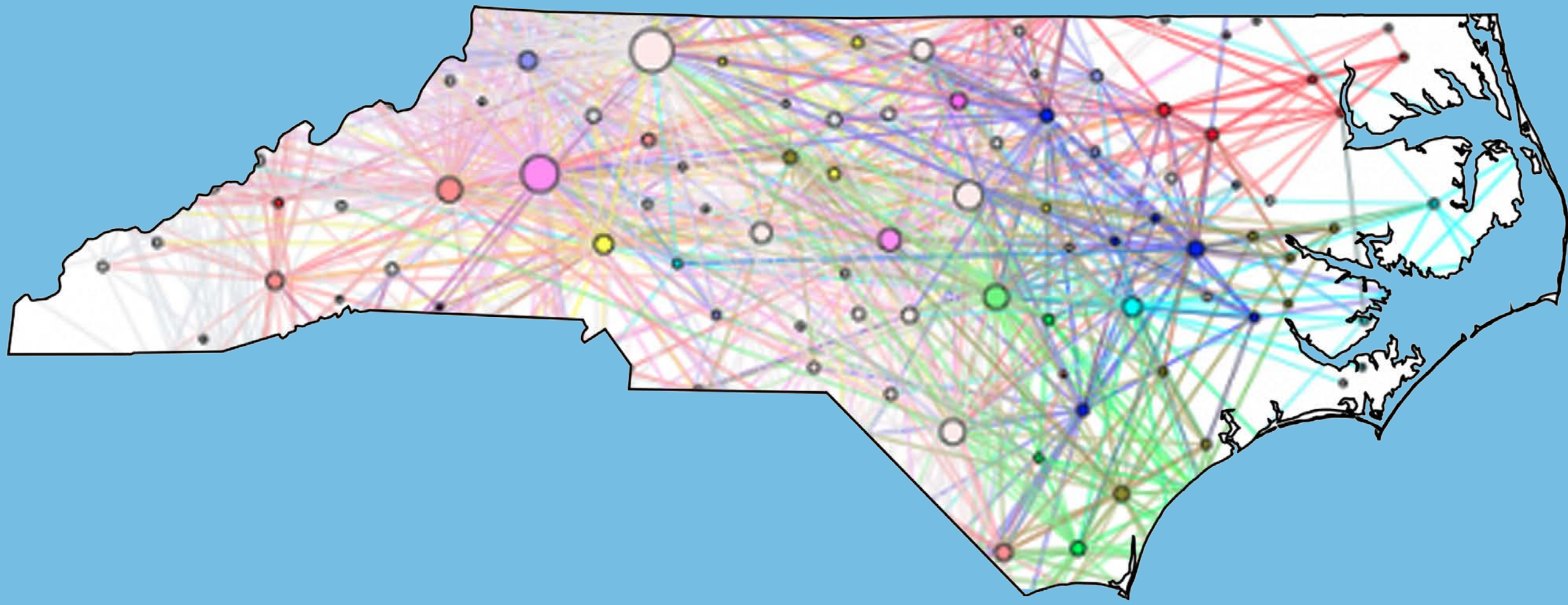
Summon Discovery Layer

Basecamp

Home
Pings
Hey!
Activity
Find
NC Cardinal - Summon
Quick Questions
stephen gilewski 6:13pm
Hi Ruth - good question...
stephen gilewski 6:14pm
Also - Ruth, will get back...
stephen gilewski 5:50pm
Hi Ruth - I've added Pro...
stephen gilewski 5:52pm
Best Bets:
Ruth Ann Copley 5:56pm
Thanks, Strephen.
Message Board
Untitled
Question — Although I
Schedule
Set important dates on a shared schedule. Subscribe to events in Google Cal, iCal, or Outlook.
Change tools (add To-
+ New...
Docs & Files
Unsorted
Homework
Week 3 Home...
Week 2 Home...
Webinar Slides
NC Live Optim... - Webinar #4.pdf
Catalog Training - Webinar #3 - NC Live
E-Resou...
Follow up Guides
David... County Public Librar...
Wayne County Public Librar...
...and 30 more
NC LIVE Summon Cohorts
Notes:
Library Details for NC LIVE Summon Cohorts (primary
Summon+360 Training Checklist - NC LIVE.docx
Full list of required training for Summon and 360 Link.
Summon Catalog Testing Checklist.docx
Checklist for reviewing your catalog records in Summon (after they have been
NC LIVE - Training Webinar List.docx
Information on the planned webinars for NC LIVE.
ExLibris-Support-Options-Quick-Reference.docx
Options for getting help from Ex Libris Support.


+ New message
Message Board
All messages
Untitled
Question by Irene Patrick • Jun 25 — Although I did attend most of the cohort webinars live, my schedule in April didn't allow for me to do much with
Progress in implementing Summon
Announcement by Benjamin Murphy • Jun 21 — I am happy to report some progress on our implementation of the Summon Discovery Layer! We started off
Webinar 5 Follow up
Announcement by stephen gilewski • May 10 — Hi Team, Thank you for those who joined our webinar today. If you missed it, the recording can be found here.
eyeShare
ay 10 — Can another person at my library have ortal? Please send an invite to
ay 10 — In the webinar this afternoon, Stephen d an e-mail from iShare with a login to ExLibris
anyone successfully embedded either of the two on to their webpages. I tried and could not get
has your library purchased that you'd example of how to set up in Summon?
en NCLive did the survey about Hosted Proxy y asked was what electronic resources your
9 — Hi all, I noticed the webinar URL was missing u didn't find it from a previous one, we'll have the
rt Portal Log ins
ilewski • May 7 — Hi Team! Just a reminder we'll day 10 May at 1 PM Eastern. We'll do a recap of
18 — Hi Team, Just a reminder we'll have another April) at 1 PM Eastern. Meeting link with call in

Resource Sharing Assessment



Year In Review

Projects

Student*Access* Project

- Total students/teacher accounts: 166,768
- Total circs since pilot (2017-18): 43,524
- Flexibility with School permission group accounts
- Copy status of Lost by students: 345

Year In Review

Projects

Consortium Consolidation Projects

- Standardize Shelving Locations (2016)
- Standardize Circulation Modifiers (2017)
- Clean Circulation & Hold Policies (2017)
- Restructure Staff and Patron Permission Groups (2018 - in progress)

Year In Review

Projects Consolidation Process

- Listserv to communicate
- Customized reports
- Online mapping spreadsheets
- Automated code-driven process
- Test server environment
- Multiple simulation test runs
- Training and Q & A
- Library testing and feedback
- Bug tracking system

Circulation Modifiers

Circ Modifier	Count
AUDIOBOOK	1644
BOOK	60734
EQUIPMENT	12
GAME	8
KIT	1095
MAGAZINE	351
MICROFORM	4
MUSIC	89
PLAYAWAY	9
TECHNOLOGY	12
VIDEO	11337

118

22

78 %
DECREASE

Circ Modifier	Count
A-DVD	300
A-FICTION	472
A-MUSIC	36
A-NEWFIC	5
A-NONFIC	500
A-PBK	232
A-SPOKEN	81
AUDIOBOOK	86
Audio	78
Big Book	4
Boardbook	655
Book	55148
Book Club Kit	1
CD	1316
Cassette	3
DVD	10544
Easy	37
Equipment	12
Games	8
J-DVD	61
J-FICTION	229
J-MUSIC	4
J-NONFIC	115
J-PBK	57
J-SPOKEN	26
J-VIDEO	15
Juv Audio	1
Juvenile book	43

Year In Review

FY 2017-2018

Projects

Policy Mapping

Library Identifier (Org Unit)	User Group (patron profile)	Shelving / Copy Location	Circulation Modifier (item type)	Circulate?	Max Items Out	Normal Loan Period in days	# of Renewals	Normal Fine	Fine Interval (days)	Grace Period (days)	Max Fine (Dollars)	Notes
SAMPLE	Adult - 3 Yr		AUDIOBOOK	TRUE	7	21	2	0.10	1	2	10	
	Juvenile - 3 Yr		AUDIOBOOK	TRUE	7	21	2	0.10	1	2	10	
	Young Adult - 3 Yr		AUDIOBOOK	TRUE	7	21	2	0.10	1	2	10	
	Outreach		AUDIOBOOK	TRUE	7	21	2	0.10	1	2	10	
	Staff		AUDIOBOOK	TRUE	7	21	2	No Fine	0	0	No Fine	
SAMPLE	Adult - 3 Yr		Book	TRUE	Threshold	21	2	0.10	1	2	10	
	Juvenile - 3 Yr		Book	TRUE	Threshold	21	2	0.10	1	2	10	
	Young Adult - 3 Yr		Book	TRUE	Threshold	21	2	0.10	1	2	10	
	Outreach		Book	TRUE	Threshold	21	2	0.10	1	2	10	
	Staff		Book	TRUE	Threshold	21	2	No Fine	0	0	No Fine	
SAMPLE	Adult - 3 Yr		Video	TRUE	7	5	0	1.00	1	2	30	
	Juvenile - 3 Yr		Video	FALSE	1	1	0	1.00	1	2	30	
	Young Adult - 3 Yr		Video	FALSE	1	1	0	1.00	1	2	30	
	Outreach		Video	TRUE	7	5	0	1.00	1	2	30	only available at main branch NOT at outreach location
	Staff		Video	TRUE	7	5	0	No Fine	0	0	No Fine	
SAMPLE	Adult - 3 Yr	Overall Reference Policy		FALSE	1	1	0	1.00	1	0	30	
	Juvenile - 3 Yr	Overall Reference Policy		FALSE	1	1	0	1.00	1	0	30	
	Young Adult - 3 Yr	Overall Reference Policy		FALSE	1	1	0	1.00	1	0	30	
	Outreach	Overall Reference Policy		FALSE	1	1	0	1.00	1	0	30	
	Staff	Overall Reference Policy		FALSE	1	1	0	No Fine	0	0	No Fine	
SAMPLE_OUTREA	Users	Policy ID 1398	Video	FALSE	1	1	0	1.00	1	2	30	

Circulation & Hold Policies

Began with 1328 circulation policies Reduced to 605

55%

decrease

Circulating Library	Org Unit	Library	Library	Active	Circ	Reference	Group	Circulation Modifier
NC Cardinal	Buncombe County Library System	NC Cardinal	NC Cardinal	t	t	f	Juvenile - 1 Yr	VIDEO
NC Cardinal	Buncombe County Library System	NC Cardinal	NC Cardinal	t	t	f	Young Adult	VIDEO
NC Cardinal	Buncombe County Library System	NC Cardinal	NC Cardinal	t	f	f	Juvenile - 1 Yr	VIDEO
NC Cardinal	Buncombe County Library System	NC Cardinal	NC Cardinal	t	t	f	Users	VIDEO
NC Cardinal	Buncombe County Library System	NC Cardinal	NC Cardinal	t	f	f	Young Adult	VIDEO
NC Cardinal	Caldwell County Public Library	NC Cardinal	NC Cardinal	t	t		Users	VIDEO
NC Cardinal	Caswell County Public Library	NC Cardinal	NC Cardinal	t	f		Juvenile - 1 Yr	VIDEO
NC Cardinal	Caswell County Public Library	NC Cardinal	NC Cardinal	t	f		Juvenile - 3 Yr	VIDEO
NC Cardinal	Caswell County Public Library	NC Cardinal	NC Cardinal	t	t		Users	VIDEO
NC Cardinal	Cleveland County Library System	NC Cardinal	NC Cardinal	t	t	f	Limited	VIDEO
NC Cardinal	Cleveland County Library System	NC Cardinal	NC Cardinal	t	t	f	Users	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	t		Juvenile - 1 Yr	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	t		Juvenile - 3 Yr	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	t		Juvenile newuser	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	t		LimitedJuvenile	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	t		LimitedJuvenile -	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	t		LimitedJuvenile n	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	f		Juvenile - 1 Yr	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	f		Juvenile - 3 Yr	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	f		newuser	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	f		LimitedJuvenile	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	f		1 Yr	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	f		newuser	VIDEO
NC Cardinal	Cumberland County Library System	NC Cardinal	NC Cardinal	t	t		Users	VIDEO
NC Cardinal	Davidson County Public Library	NC Cardinal	NC Cardinal	t	f	f	LimitedTeenJuv	VIDEO
NC Cardinal	Davidson County Public Library	NC Cardinal	NC Cardinal	t	f	f	Teen	VIDEO
NC Cardinal	Davidson County Public Library	NC Cardinal	NC Cardinal	t	f	f	Juvenile - 3 Yr	VIDEO
NC Cardinal	Davidson County Public Library	NC Cardinal	NC Cardinal	t	f	f	LimitedJuvenile	VIDEO
NC Cardinal	Davidson County Public Library	NC Cardinal	NC Cardinal	t	f	f	Preschool	VIDEO
NC Cardinal	Davidson County Public Library	NC Cardinal	NC Cardinal	t	f	f	TeenJuv	VIDEO
NC Cardinal	Davidson County Public Library	NC Cardinal	NC Cardinal	t	t	f	Users	VIDEO
NC Cardinal	Davie County Public Library	NC Cardinal	NC Cardinal	t	t	f	Users	VIDEO

Projects — Staff Reception and Impact

- Circ reports - reporting by shelving location instead of circ mod
- Summer - busy for libraries, so not a great time for big projects
- “It seems to have gone smoothly and DIDN'T impact any of our workflows. I think the background work that was done to make sure the old mods mapped correctly to the new mods was (must have been) well done to account for the relatively painless transition.”

Year In Review

FY 2017-2018

Projects

AV and E-resource Deduplication

- Carefully analyze data
- Establish matching criteria
- Isolate the audio-visual records and electronic records from print and each other
- TEST; re-evaluate criteria
- Run on production

Audio Visual Deduplication

Typical merge set:

material identifier - 020 az normalized, confirmed for validity and converted to 13 digits
search record format (null not allowed)
large print indicator (null is fine)
normalized author (null not allowed, drawn from 100$a and going in descending preference to other responsibility fields)
normalized title (null not allowed, drawn from 245$a and going in descending preference to other title fields)

Audio Visual Deduplication

If bib has format then use it
if not then use RDA 336/337/338; if conflict, go with majority of circ mods on bib
if no either then use majority circ mods and if neither exists use the most recent circ mod item

Audio Visual Deduplication

The basic profiles end up looking something like this:

```
-[ RECORD 1 ]---+--------------------------------
record          | 1389447
can_have_copies | t
isbn_values     | {9781611735048}
upc_values      |
title           | the little shepherd of kingdom come
author          | fox, john
pubdate         | 2012
search_format   | book
large_print     | t
content_type    | {text}
media_type      | {unmediated}
carrier_type    | {volume}
```

Audio Visual Deduplication

AV pool being formed by :

count	search_format
34858	cdmusic
9642	vhs
12957	music
674	casmusic
2121	blu-ray
91316	dvd
70	phonospoken
57918	cdaudiobook
4603	casaudiobook

total: 214,159

E-Materials pool formed by:

count	search_format
25998	eaudio
84469	ebook
7724	evideo

total: 118,191

Audio Visual Deduplication

Records	Title	Search Format	Lead Record	Score	Your name & phor	Notes
10368924,1217711	the testament	cdaudiobook	1025219	29		
8079581	the widows of eastwick	cdaudiobook	679710	26		
885093	mind prey	cdaudiobook	336377	20		
1760381,4321981	the secret man	cdaudiobook	6369199	28	Sunnie Prevette 336	checked
3753101	does this clutter make my butt look fat	cdaudiobook	872412	17		
8338384,8087441,884079,1222145	her fearful symmetry	cdaudiobook	692178	31		
3752811	himalaya	cdaudiobook	8047636	12		
3755380	100 ways to create wealth	cdaudiobook	8074658	15		
4501649	the night season	cdaudiobook	2230231	28		
118680	lawman	cdaudiobook	3121551	20	Kim Sirois 910-814-	checked; lead good - Also possible match to ID6455030 & ID3908386 only difference is one is this set is retail ed. other is library ed.
3908386	lawman	cdaudiobook	6455030	20	Kim Sirois 910-814-	possible match to records 3121551 & 39038386
3666600	good to great	cdaudiobook	10503968	27		
3687345,8048473	moll flanders	cdaudiobook	1174202	20	Meghan Blackburn	Looks good
663262	mariel of redwall	cdaudiobook	3791167	26		
3694464	little scarlet	cdaudiobook	1593037	20		
5175985	high profile	cdaudiobook	2195297	22		
1368092	the bourne identity	cdaudiobook	4479622	21		
627368	truth and fiction in the da vinci code	cdaudiobook	2554755	26		
9076223	darkest hour	cdaudiobook	3766500	25		
10399222	american thighs	cdaudiobook	3118046	20		

Year In Review

FY 2017-2018

Projects

Audio Visual Deduplication

- 17,774 groups/lead records
- 38,723 records merged
- 20,949 records subsumed

The final merge groups looked as follows:

count	search format
5	book,dvd
89	casaudiobook
5	casmusic,music
5428	cdaudiobook
4	cdaudiobook,eaudio
11	cdmusic,dvd,music
876	cdmusic,music
44	dvd
1	dvd,kit
2625	eaudio
8521	ebook
28	evideo
133	music
3	music,phonomusic
1	vhs

Year In Review

FY 2017-2018

Projects

Staff Education Development

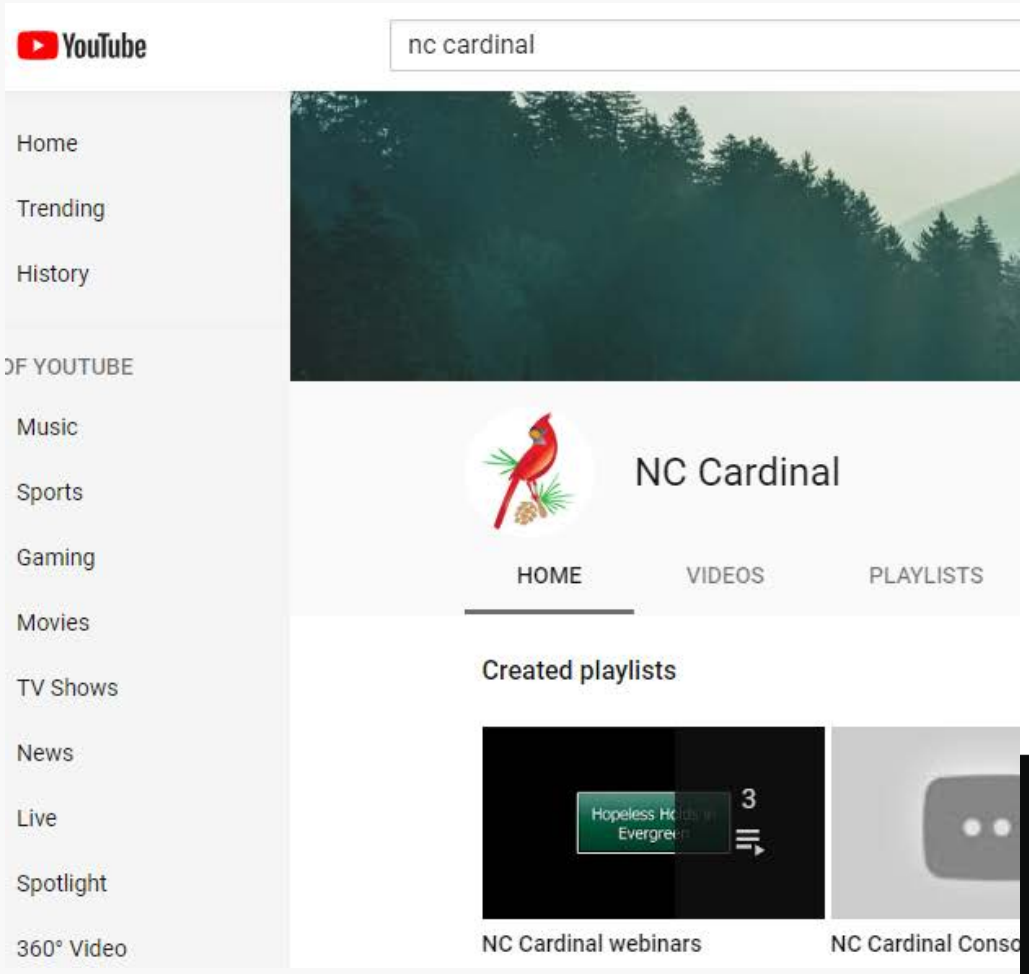
- Reports Training & Documentation
- MOBIUS migration
- Cataloging Training & Assessment

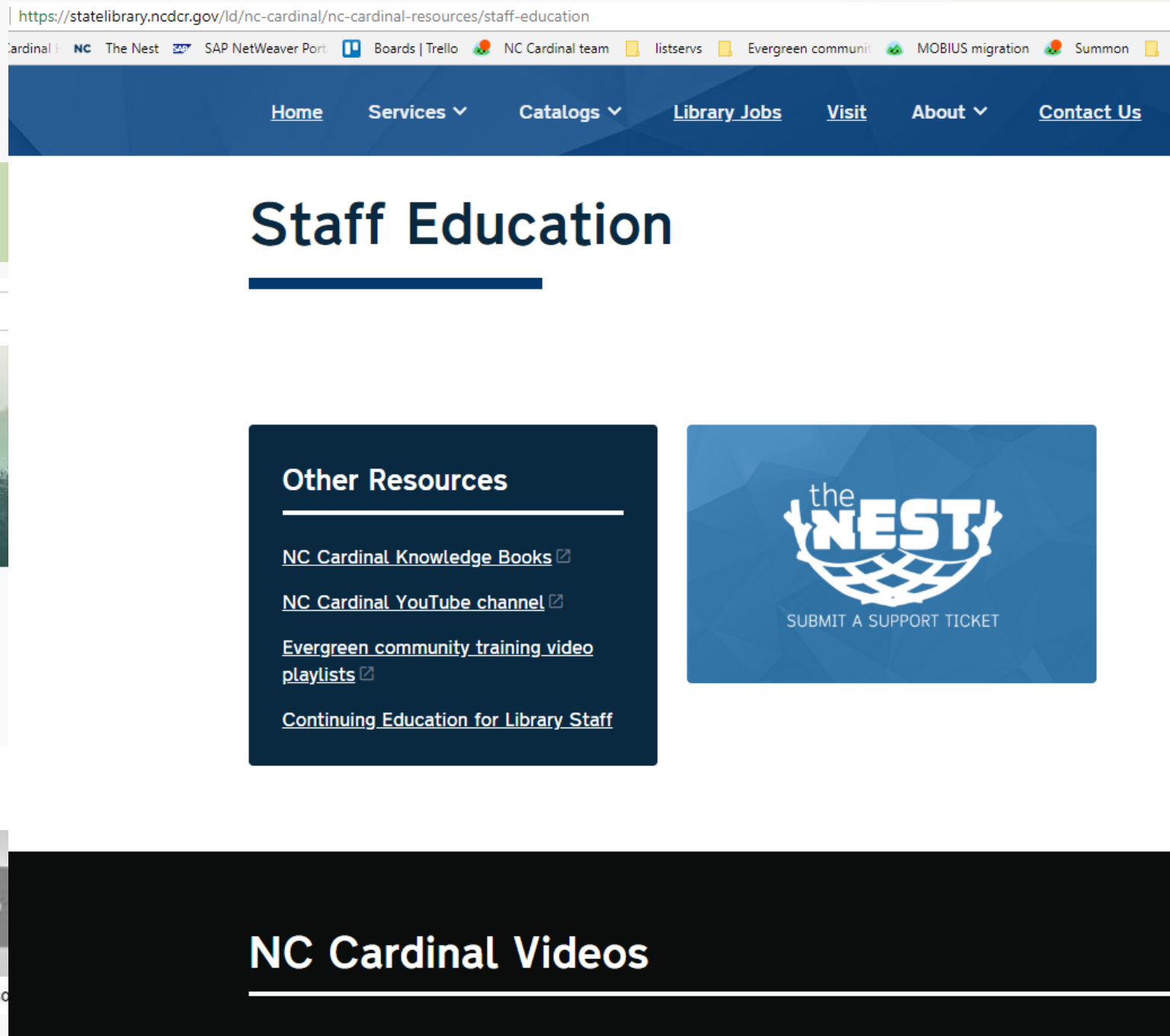
Knowledge Books

Videos

Year In Review

Projects





Year In Review

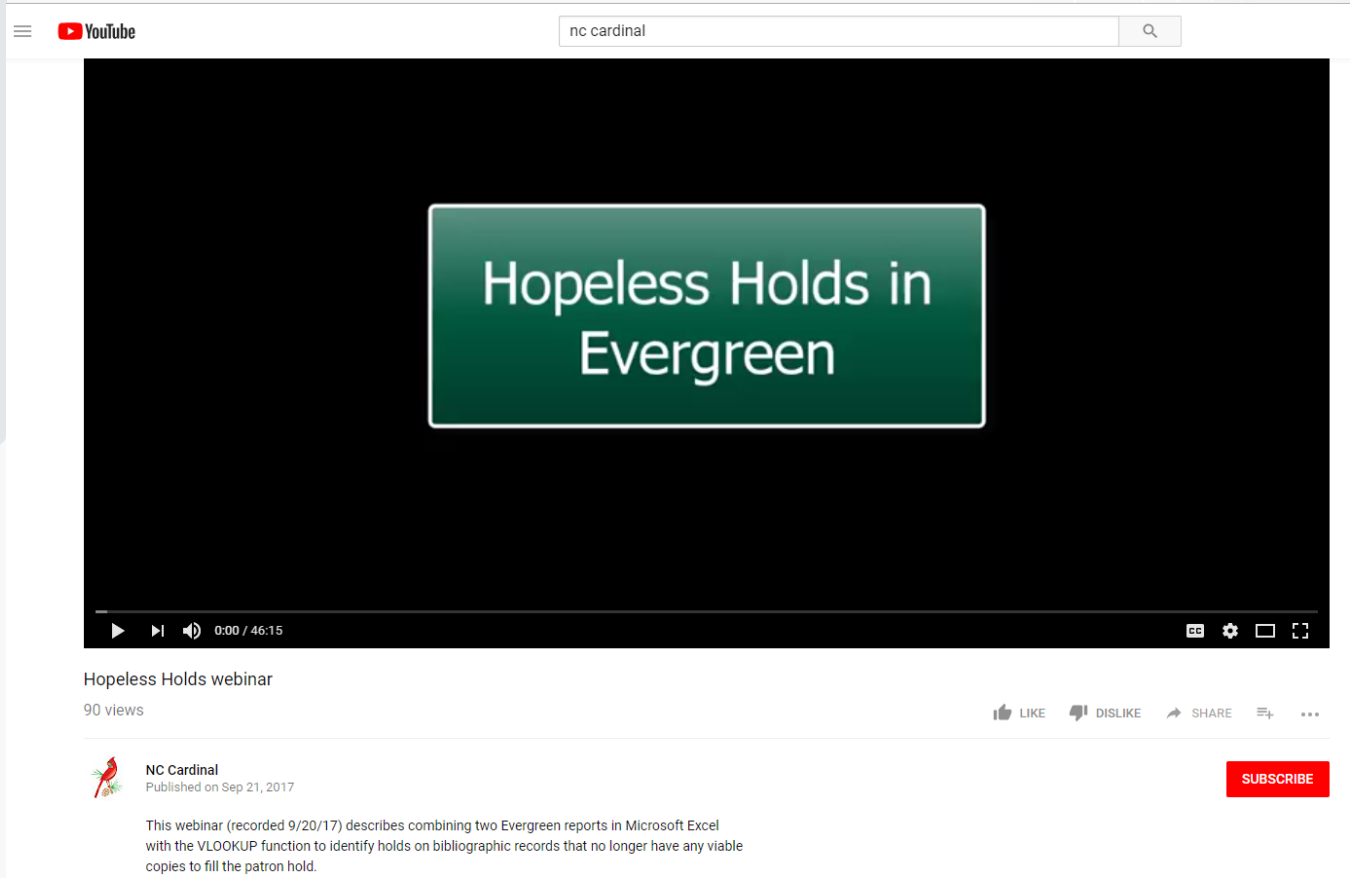
FY 2017-2018

Projects

Reports Training

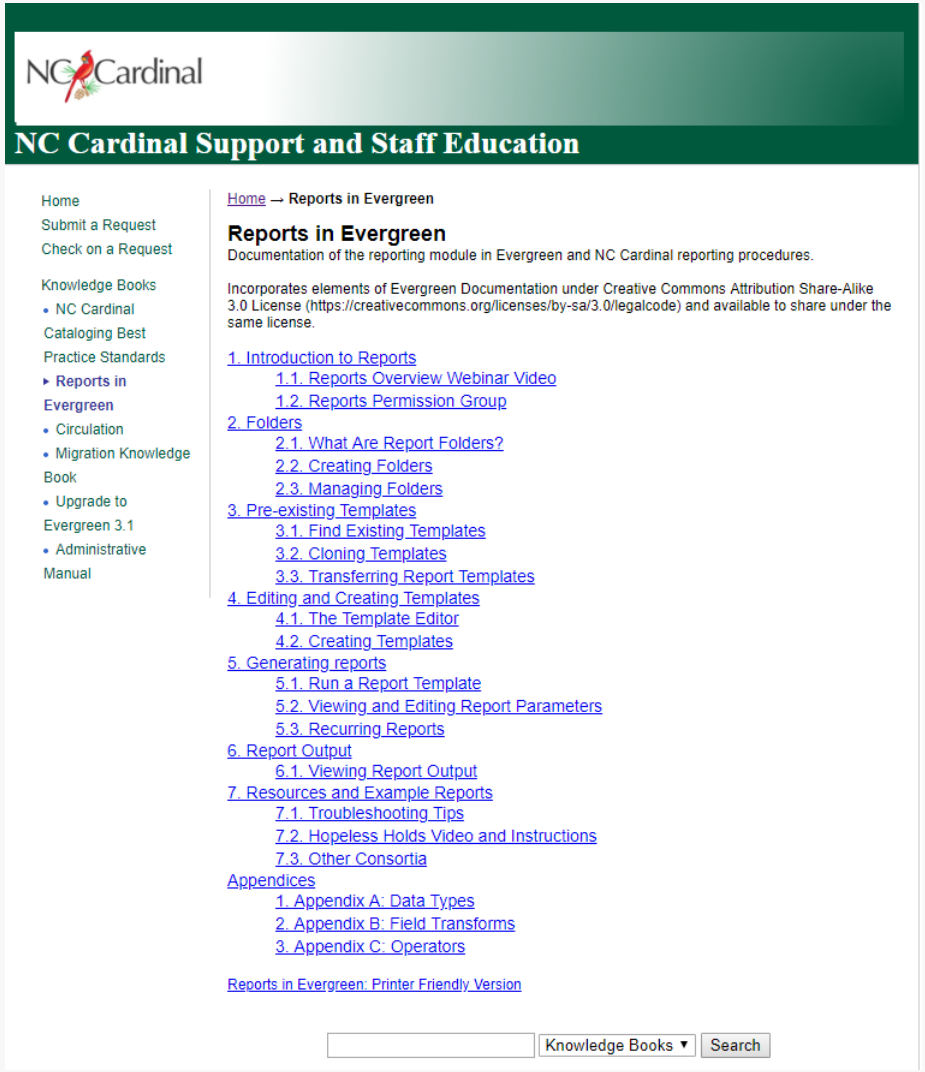
Hopeless Holds – 9/20/17

- Presenter: Lise Keppler, Forsyth
- 13 attendees
- 90 views of video



Reports knowledge book

https://nccardinalsupport.org/index.php?pg=kb.book&id=4



Year In Review

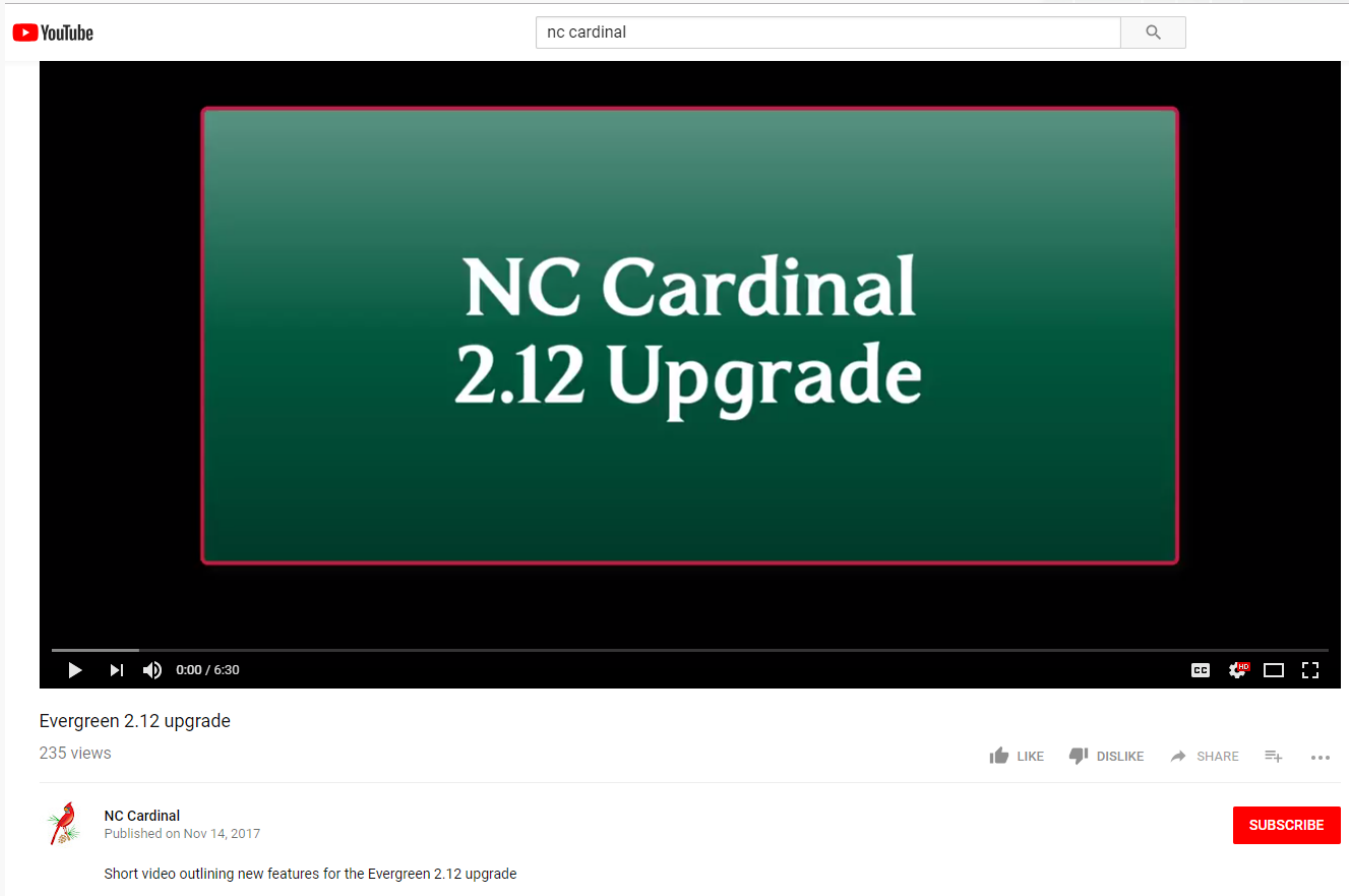
FY 2017-2018

Projects

Upgrade to Evergreen 2.12

Evergreen 2.12 Upgrade

- Presenter: April Durrence
- released 11/14/17
- 235 views of video



Year In Review

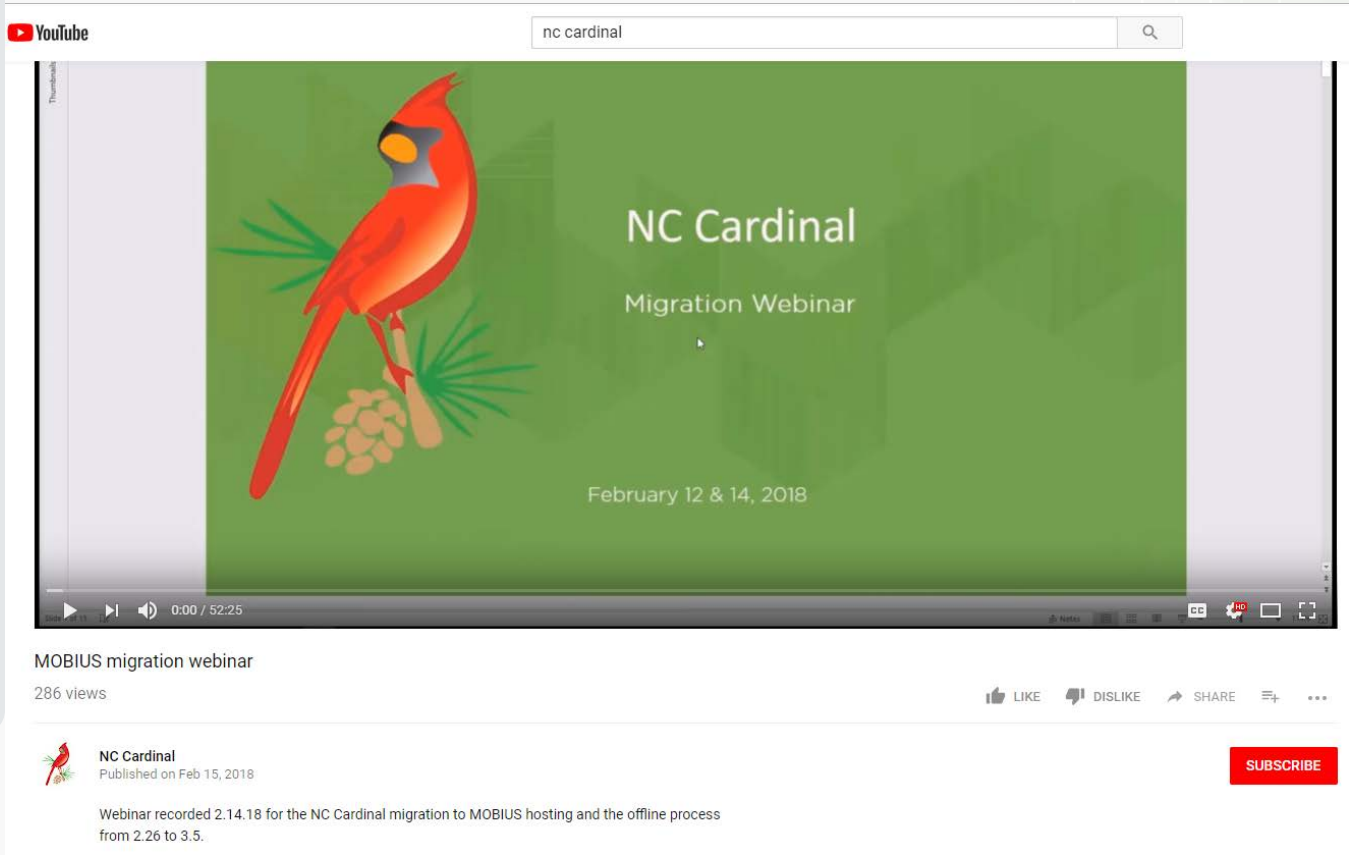
FY 2017-2018

Projects

MOBIUS Migration Training

Two training webinars for migration to MOBIUS

- Presenters: Benjamin Murphy & April Durrence
- 2/12/18 – 55 attendees
- 2/14/18 – 83 attendees
- Edited video
  - ➢ released 2/15/18
  - ➢ 286 views



Year In Review

FY 2017-2018

Projects

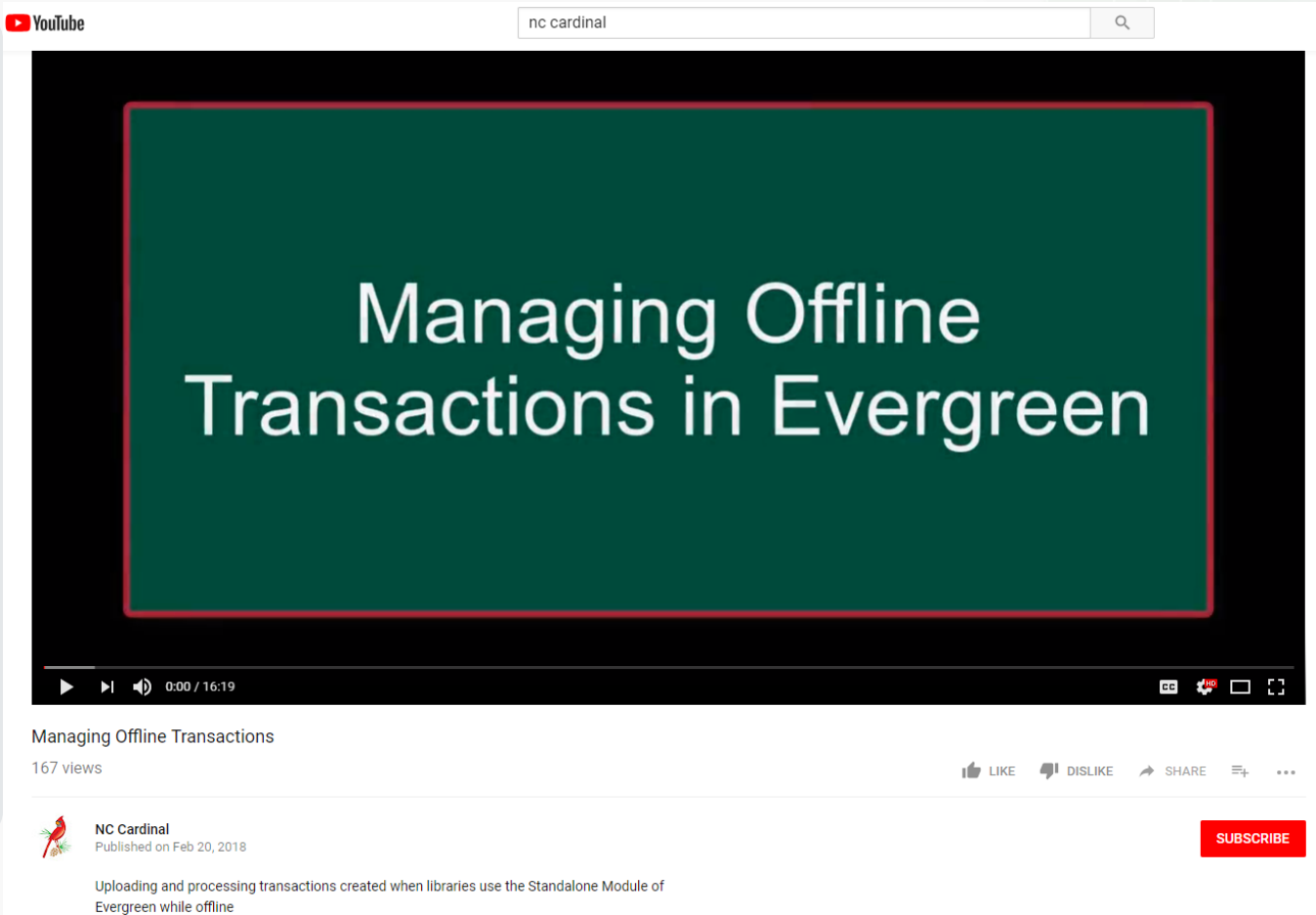
MOBIUS Migration Training

Processing Offline Transactions Q & A webinar

- 2/27/18
- 35 attendees

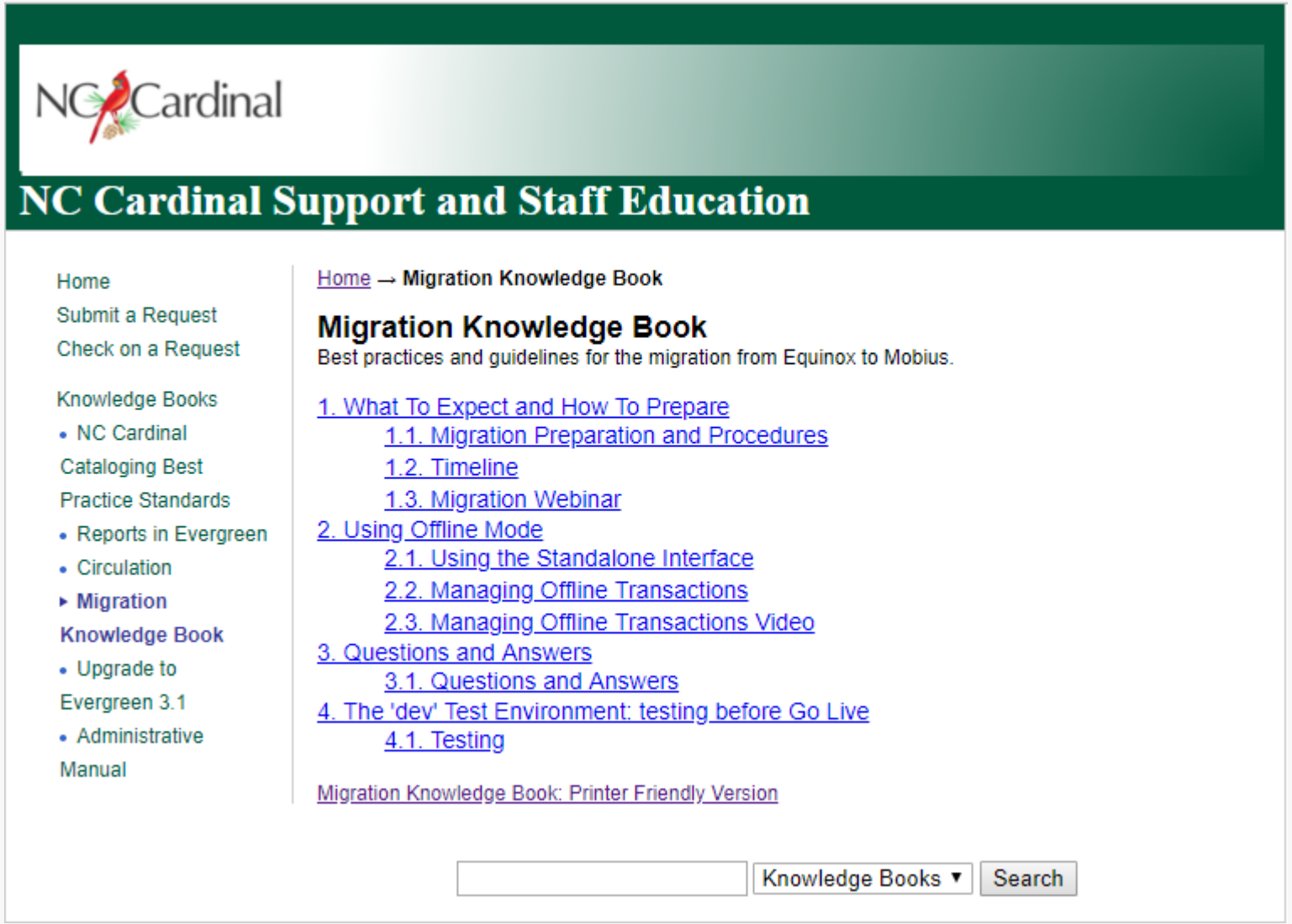
Managing Offline Transactions video

- Released 2/20/18
- 167 views



MOBIUS Migration knowledge book

https://nccardinalsupport.org/index.php?pg=kb.book&id=8



Projects

Cataloging Training & Assessment

Winter 2017/18: All staff with cataloging permissions should review and begin using the newly expanded Cataloging Best Practice standards. Please submit questions to the Cataloging Committee and/or the NC Cardinal team.

Spring/Summer 2018: Item Cataloging and Bib Cataloging assessments will become available.

Item Cataloging and Bib Cataloging workshops with Dr. Sonia Archer-Capuzzo

Cataloging Forum - discuss feedback for Best Practice standards, training & assessments, and resolve questions with the Cataloging Committee.

Projects

Cataloging Training & Assessment

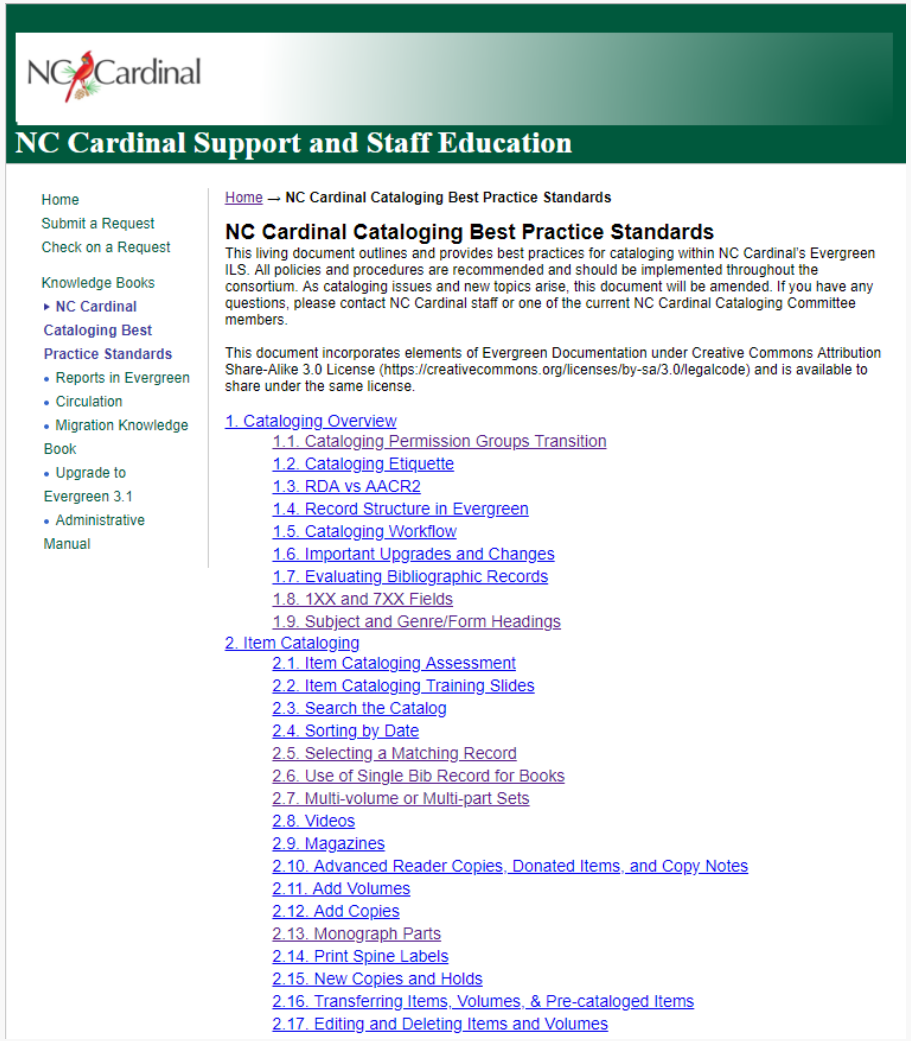
Fall 2018: Item Cataloging and Bib Cataloging workshops with Dr. Sonia Archer-Capuzzo

Staff who need cataloging permissions continue taking cataloging assessments.

January 2019: All staff who need cataloging permissions should have completed assessments. The assessments are open book and can be repeated until a passing score is achieved. Staff who add or delete item and/or volume records will need to pass the Item Cataloging assessment. Anyone creating, importing, editing, or deleting bibliographic records will need to pass both the Item Cataloging assessment and the Bibliographic Cataloging assessment.

Cataloging Best Practices knowledge book

https://nccardinalsupport.org/index.php?pg=kb.book&id=3



NC Cardinal

NC Cardinal Support and Staff Education

Home
Submit a Request
Check on a Request

Knowledge Books
▸ NC Cardinal Cataloging Best Practice Standards
• Reports in Evergreen
• Circulation
• Migration Knowledge Book
• Upgrade to Evergreen 3.1
• Administrative Manual

Home → NC Cardinal Cataloging Best Practice Standards

NC Cardinal Cataloging Best Practice Standards

This living document outlines and provides best practices for cataloging within NC Cardinal's Evergreen ILS. All policies and procedures are recommended and should be implemented throughout the consortium. As cataloging issues and new topics arise, this document will be amended. If you have any questions, please contact NC Cardinal staff or one of the current NC Cardinal Cataloging Committee members.

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

1. Cataloging Overview
   - 1.1. Cataloging Permission Groups Transition
   - 1.2. Cataloging Etiquette
   - 1.3. RDA vs AACR2
   - 1.4. Record Structure in Evergreen
   - 1.5. Cataloging Workflow
   - 1.6. Important Upgrades and Changes
   - 1.7. Evaluating Bibliographic Records
   - 1.8. 1XX and 7XX Fields
   - 1.9. Subject and Genre/Form Headings
2. Item Cataloging
   - 2.1. Item Cataloging Assessment
   - 2.2. Item Cataloging Training Slides
   - 2.3. Search the Catalog
   - 2.4. Sorting by Date
   - 2.5. Selecting a Matching Record
   - 2.6. Use of Single Bib Record for Books
   - 2.7. Multi-volume or Multi-part Sets
   - 2.8. Videos
   - 2.9. Magazines
   - 2.10. Advanced Reader Copies, Donated Items, and Copy Notes
   - 2.11. Add Volumes
   - 2.12. Add Copies
   - 2.13. Monograph Parts
   - 2.14. Print Spine Labels
   - 2.15. New Copies and Holds
   - 2.16. Transferring Items, Volumes, & Pre-cataloged Items
   - 2.17. Editing and Deleting Items and Volumes
3. Bibliographic Cataloging
   - 3.1. Bibliographic Cataloging Training Slides
   - 3.2. Add a Title Record via Z39.50 Import
   - 3.3. Pre-Processing/On-Order Materials
   - 3.4. Load MARC Order Records via Acquisitions
   - 3.5. Batch Import Bibliographic Records and Holdings
   - 3.6. Electronic Resources
   - 3.7. Inspecting the Import Queue
   - 3.8. Deleting an Upload Queue
   - 3.9. Record Conflicts
   - 3.10. Merge/Overlay Profiles
   - 3.11. Duplicate Records and Merging
   - 3.12. Different Format/Material Types
   - 3.13. Cataloging Kits
   - 3.14. Creating Original Records
   - 3.15. Deleting Bibliographic Records
4. MARC Record Templates
   - 4.1. Audio Fiction
   - 4.2. Audio Nonfiction
   - 4.3. Blu-ray only
   - 4.4. Blu-ray/DVD combo
   - 4.5. DVD only
   - 4.6. Large Print Fiction
   - 4.7. Large Print Nonfiction
   - 4.8. Launchpad
   - 4.9. MP3
   - 4.10. Music CD
   - 4.11. Playaway
   - 4.12. Print Fiction
   - 4.13. Print Nonfiction
   - 4.14. Vox
5. Appendices
   - 5.1. Appendix A: Cataloging Forum
   - 5.2. Appendix B: Using GMDs
   - 5.3. Appendix C: 007 Tag
   - 5.4. Appendix D: Fixed Fields (008 Tag)
   - 5.5. Appendix E: 020 Tag (ISBNs)
   - 5.6. Appendix F: Commonly Used Relationship Designators
   - 5.7. Appendix G: Diacritics
   - 5.8. Appendix H: Record Match Sets and Merge Profiles
   - 5.9. Appendix I: Item Templates
   - 5.10. Appendix J: Search and Icon Formats
   - 5.11. Appendix M: Shelving Locations
   - 5.12. Glossary
   - 5.13. Useful Resources

NC Cardinal Cataloging Best Practice Standards: Printer Friendly Version

Knowledge Books ▾ Search

Year In Review

FY 2017-2018

Projects

Cataloging Best Practices Training

East Region: Wilmington	West Region: Asheville	Central Region: Winston-Salem
Item Cataloging		
4/18/18 13 attendees	5/9/18 30 attendees	5/16/18 47 attendees
Bibliographic Cataloging		
4/19/18 12 attendees	5/10/18 26 attendees	5/17/18 30 attendees

Year In Review

Projects — Cataloging Best Practices Training

- Training recorded in Winston-Salem
- Edited by our intern, Adreonna Simmons
- Available online in August
- Training Slides & materials available now

Year In Review

Projects

CBP Training Survey

Item and Bibliographic Cataloging Training: delivered by Dr. Sonia Archer-Capuzzo

- 94% rated training as very high/high quality
- 99% rated instructor as very responsive to questions

Projects

CBP Training Survey

What was the best thing you learned today?

"Probably the most important thing was to refer to the Cataloging Best Practices when in doubt and to report oddities in Evergreen to the bibliographic catalogers."

"We're all getting on the same page with some good basic training for identifying good catalog records in Evergreen"

Projects CBP Training Survey

Additional comments:

"Presenter really gave us a helpful program with lots of in depth insight - would love to take another class with her"

"Feeling good about it all now."

"Workshop exceeded all expectations. Been out of library school since 2000 and this was a wonderful refresher"

"Love the presenter!!!"

Committee & Working Group Updates

Cataloging Committee

New Committee Members

Cataloging Committee

Rolling Off:

Forest Doyle (Buncombe County)
Eve Grünberg (Government and Heritage Library)

Joining:

Angie Bates (Perry Memorial Library)
Wanangwa Hartwell (Polk County Public Libraries)

Cataloging Committee

Training & Assessment

Development with Dr. Sonia Archer-Capuzzo
Subject matter expertise
Attended training sessions with feedback
Expansion and evolution of Cataloging Best Practices
Evaluating and augmenting assessments

Cataloging Forum

Forsyth Central Library on 5/31/18

27 cataloging representatives

Led by the Cataloging Committee:
Forest Doyle, Jonathan Furr, Christina Martin, Jessica Philyaw, and Jennifer Weston

Cataloging Committee

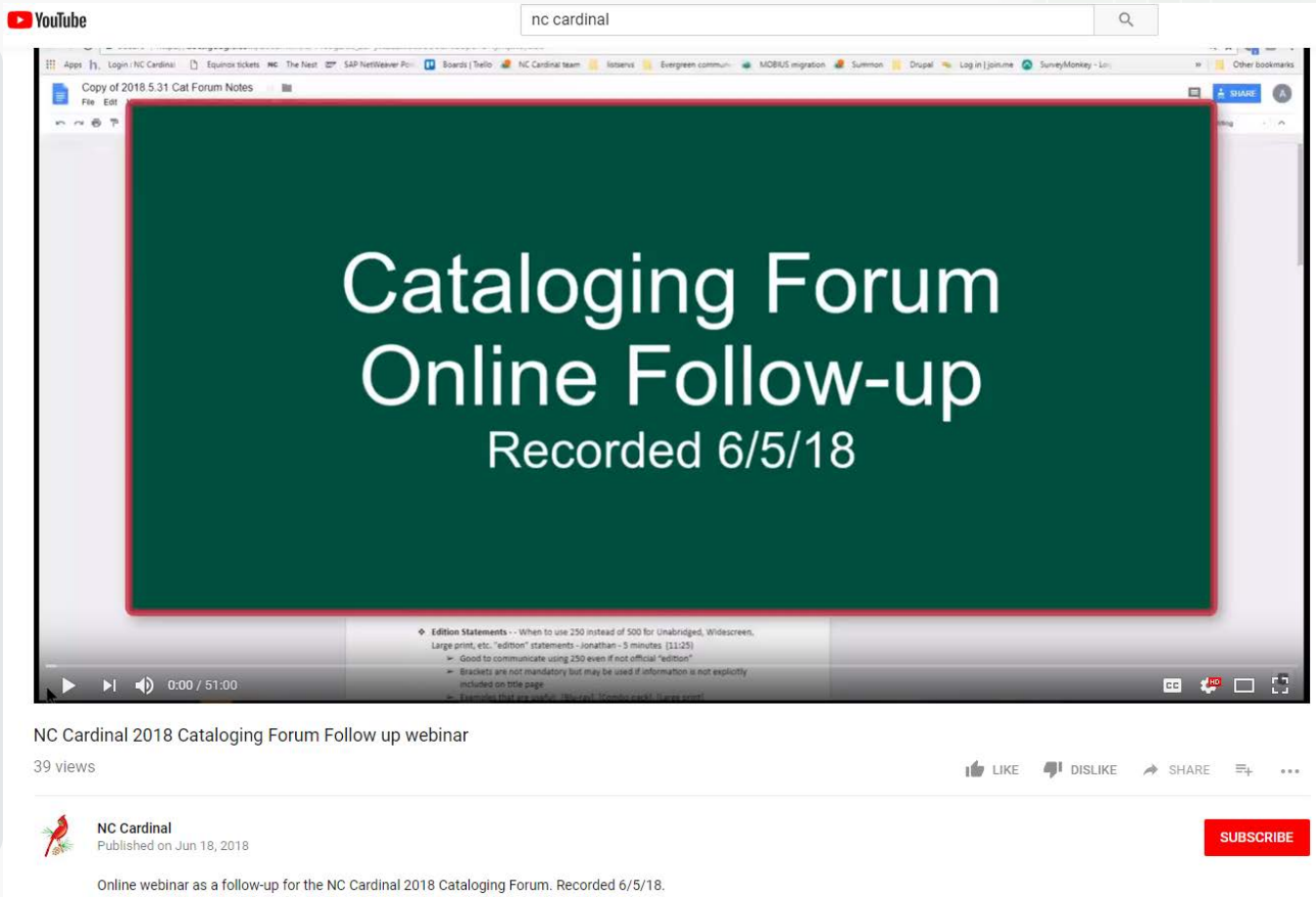
Cataloging Forum

Follow-up webinar

- Presenters: Committee members
- 6/5/18
- 25 attendees

Edited video

- released 6/18/18
- 39 views



Cataloging Committee

Cataloging Assessments

- All staff who wish to retain cataloging permissions will need to pass assessments by January 2019. This includes staff who only catalog from time to time, such as adding or deleting items.
- Fall training classes are last in-person opportunity this fiscal year
- Online resources always available – CBP knowledge book, training slides, and videos
- Each library director needs to ensure staff who catalog are trained and pass assessments by January

Cataloging Committee

Staff Login Accounts

- Full compliance goal – January 2019
- Each system should have a Staff Login Access Manager
- Each system should be assigning Individual logins for staff using cataloging and/or admin permission groups
- Generic cataloger and admin login accounts permanently deleted by January 2019

Authorities Working Group

Authorities Working Group

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.

Authorities Working Group

Current Membership

- Sharon Arnette (Henderson)
- Mary Atkinson (Harnett)
- Nicole deBruijn (Appalachian Regional)
- Meghan Blackburn (Cleveland)
- Christina Martin (Mauney)
- Jennifer Weston (Davidson)

Authorities Working Group

ROADMAP

Phase One (Jan 2018 - Jun 2018)

- Document Authorities Best Practices for using preferred vocabularies for Subject Headings and Genre/Form terms
- Submit Recommendations for Authorities for Cataloger Training
- Prepare RFP specifications for database cleanup & authority processing

Authorities Working Group

ROADMAP

Phase Two (July 2018 – Sept 2018)

- Assist in choosing vendor for backfile database cleanup & authority processing
- Complete testing of vendor files & provide QA for database updates
- Create authorities data project summary report and update Best Practices

Authorities Working Group

ROADMAP

Phase Three (Sept 2018 – Nov 2018)

- Test authority control in development database prior to scheduled 3.1 upgrade
- Identify & document changes in authorities workflow in 3.1

Authorities Working Group

ROADMAP

Phase Four (Dec 2018 – Mar 2019)

- Update Authorities Best Practices
- Implement formal authorities maintenance plan with shared responsibilities
- Devise Authorities Training Plan for bib catalogers

Resource Sharing / User Experience Committee

New Committee Members

Resource Sharing Committee

Committee name change to User Experience

Governance board unanimously voted for new perspective and charge

Getting the committee back to its original purpose – patron focused attention to Cardinal

New Committee Members

Resource Sharing / User Experience Committee

Rolling Off:
Angela McCauley- Harnett
Krysti Thomas – Cumberland
Kimberly Davenport - Brown

Joining:
Meghan Blackburn – Cleveland
Teresa Patti – Brown
Tammy Holt - Cumberland
Joel Ferdon – Davie
Camelia Walker - Wayne

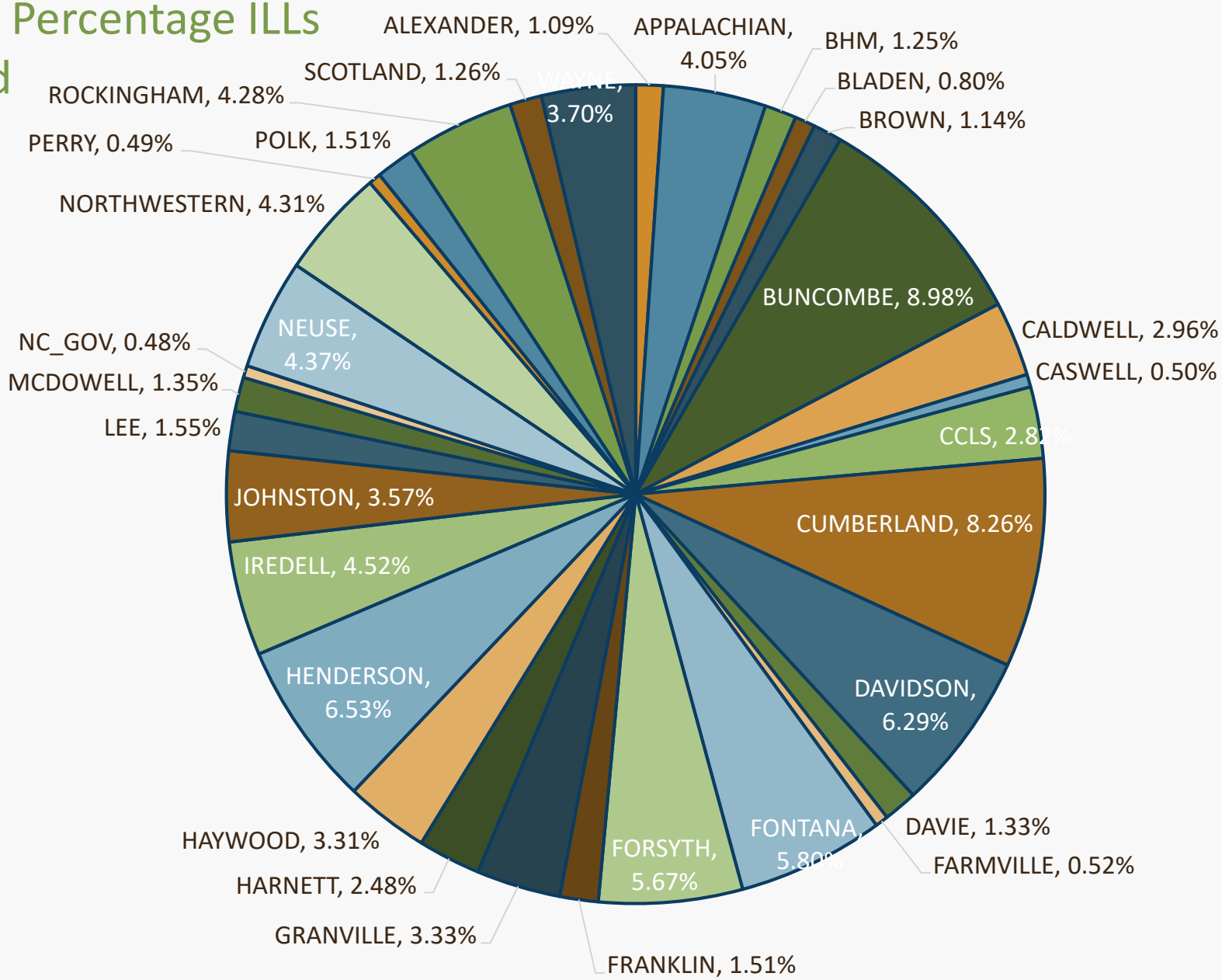
Public Library Statistics for NC Cardinal Libraries

Public Library Stats for NC Cardinal Libraries

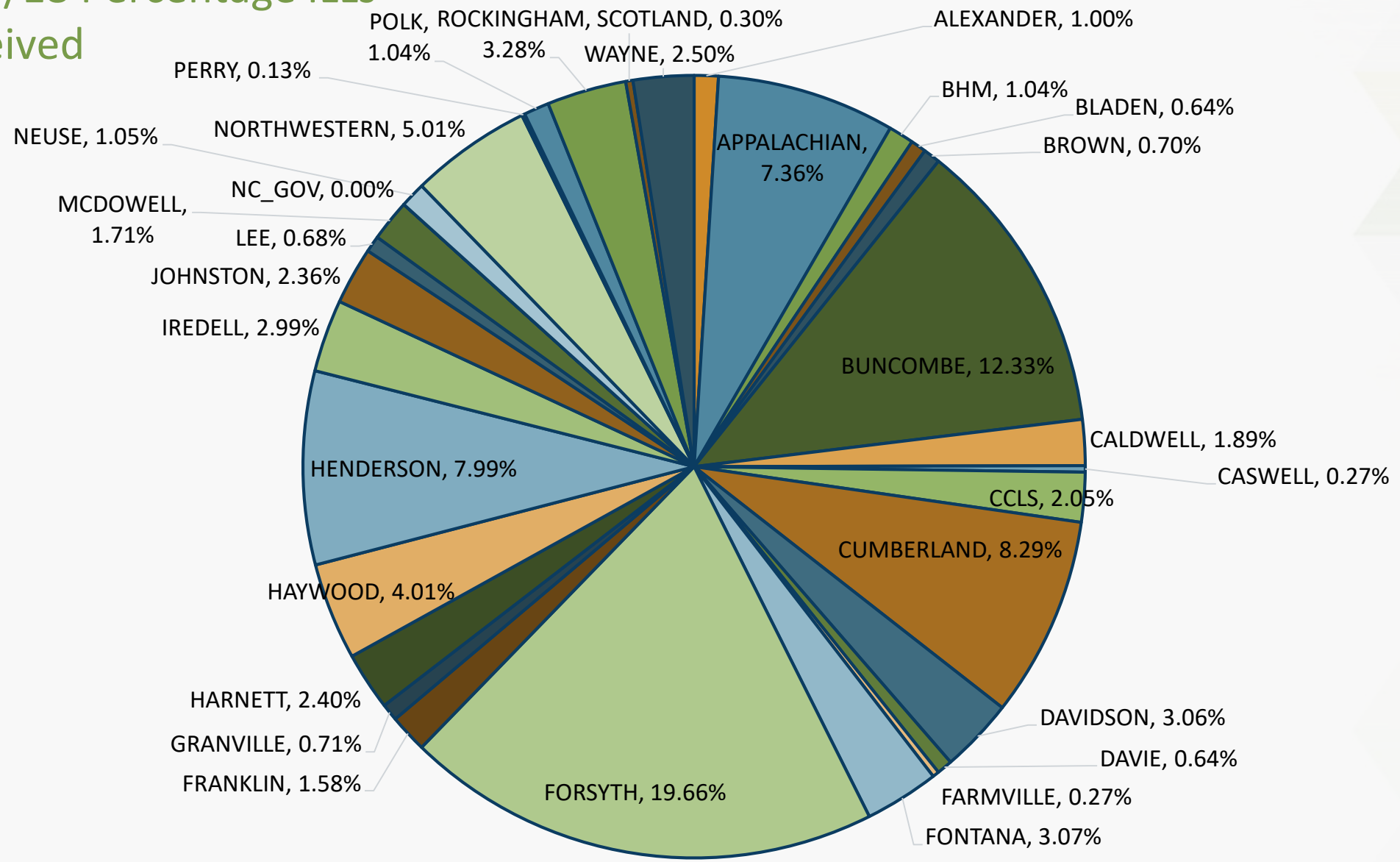
FY 17/18

- Circulations –*9,602,805* (*50,921,790* circs since beginning of Cardinal in 2011)
- Transits – *2,141,418* (*8,888,710* transits since Cardinal began Resource Sharing 2013)
- ILLs for Parent to Parent system– *793,582 (66,132 average monthly)*

FY17/18 Percentage ILLs Provided



FY17/18 Percentage ILLs Received



Public Library Stats for NC Cardinal Libraries

PLS data change for Cardinal

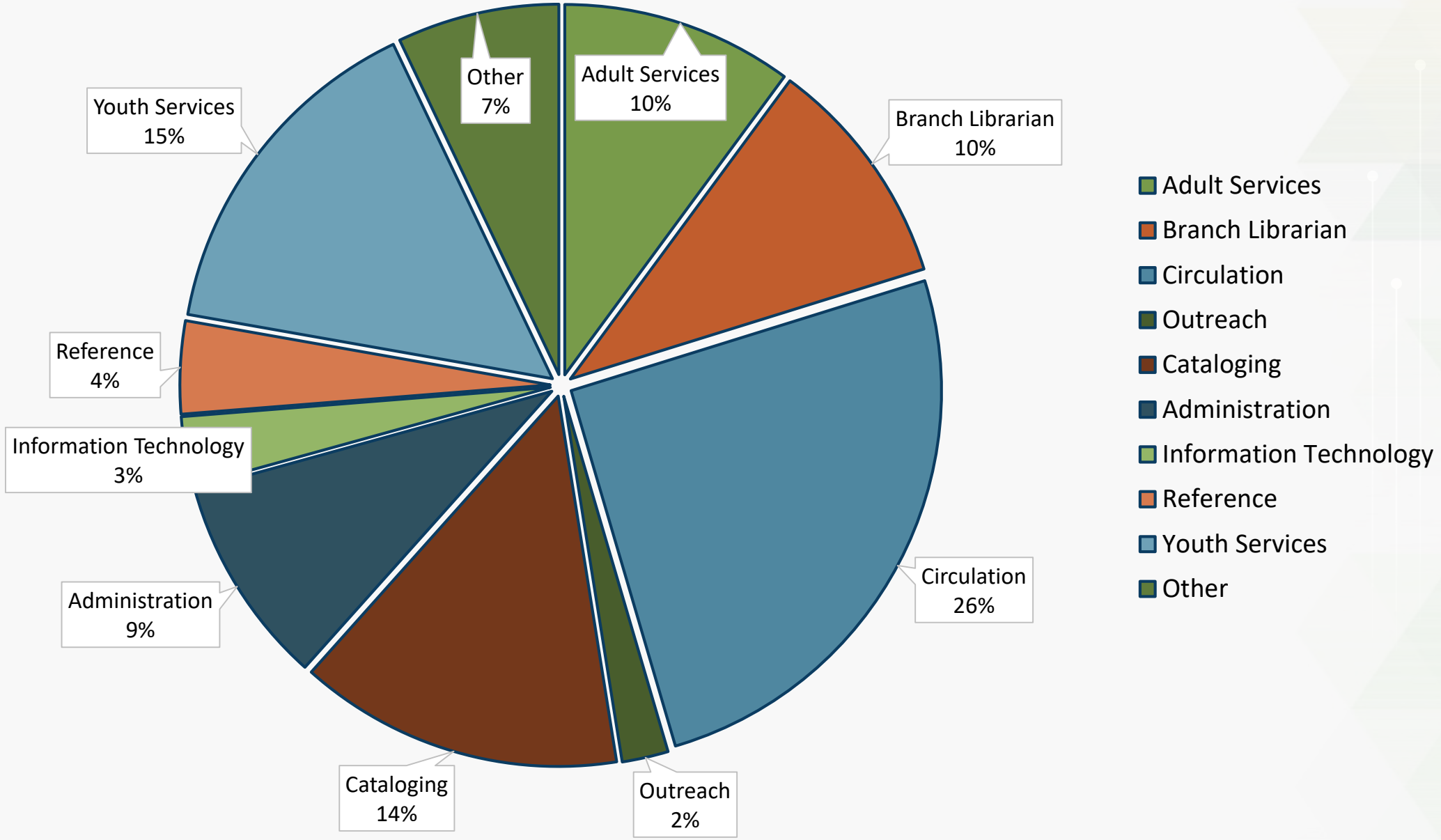
- Cardinal library systems' data are now broken down by shelving locations
- Circ mods data were used for 3 Cardinal systems up until this year

SRP (Summer Reading Programs)

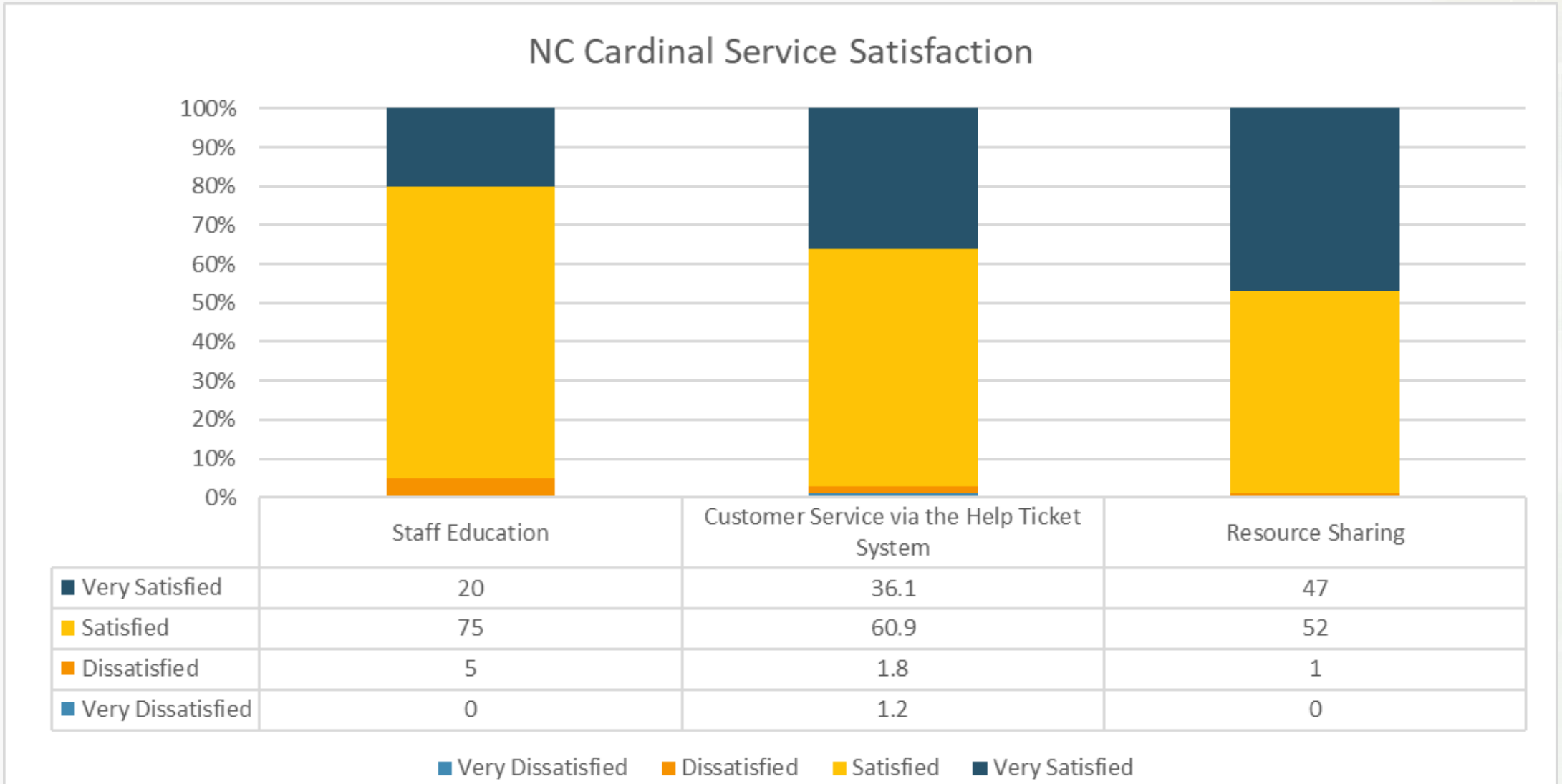
- June 1st through August 31st
- Calculate Juvenile / Young Adult books circulated

Annual Survey Results

Respondent Role Breakdown

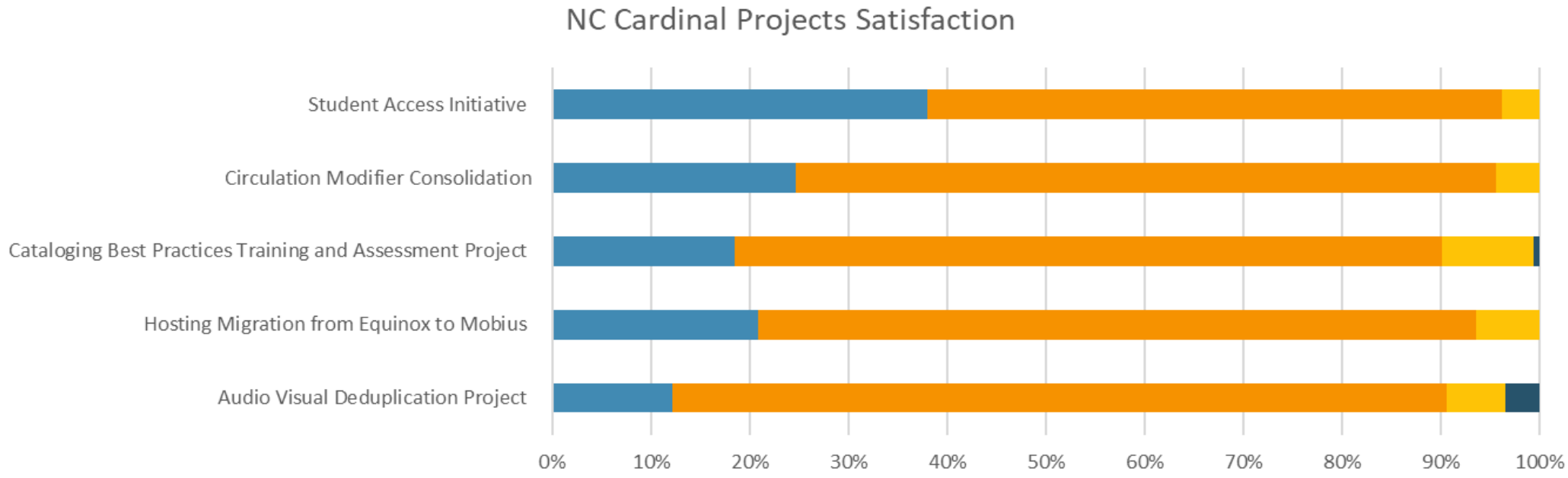


How satisfied are you with the following NC Cardinal services?



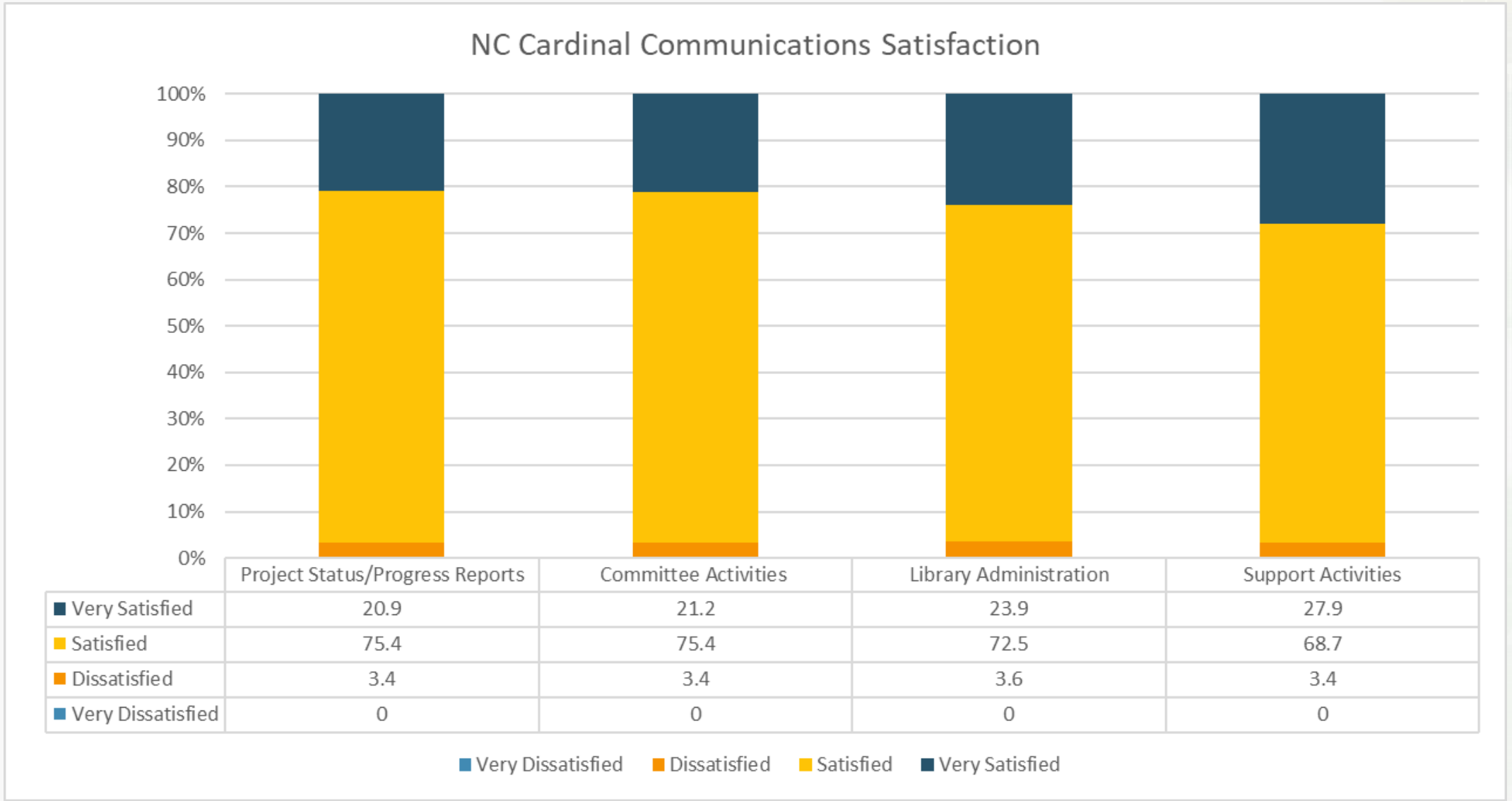
	Staff Education	Customer Service via the Help Ticket System	Resource Sharing
Very Satisfied	20	36.1	47
Satisfied	75	60.9	52
Dissatisfied	5	1.8	1
Very Dissatisfied	0	1.2	0

How satisfied are you with the following NC Cardinal Projects?



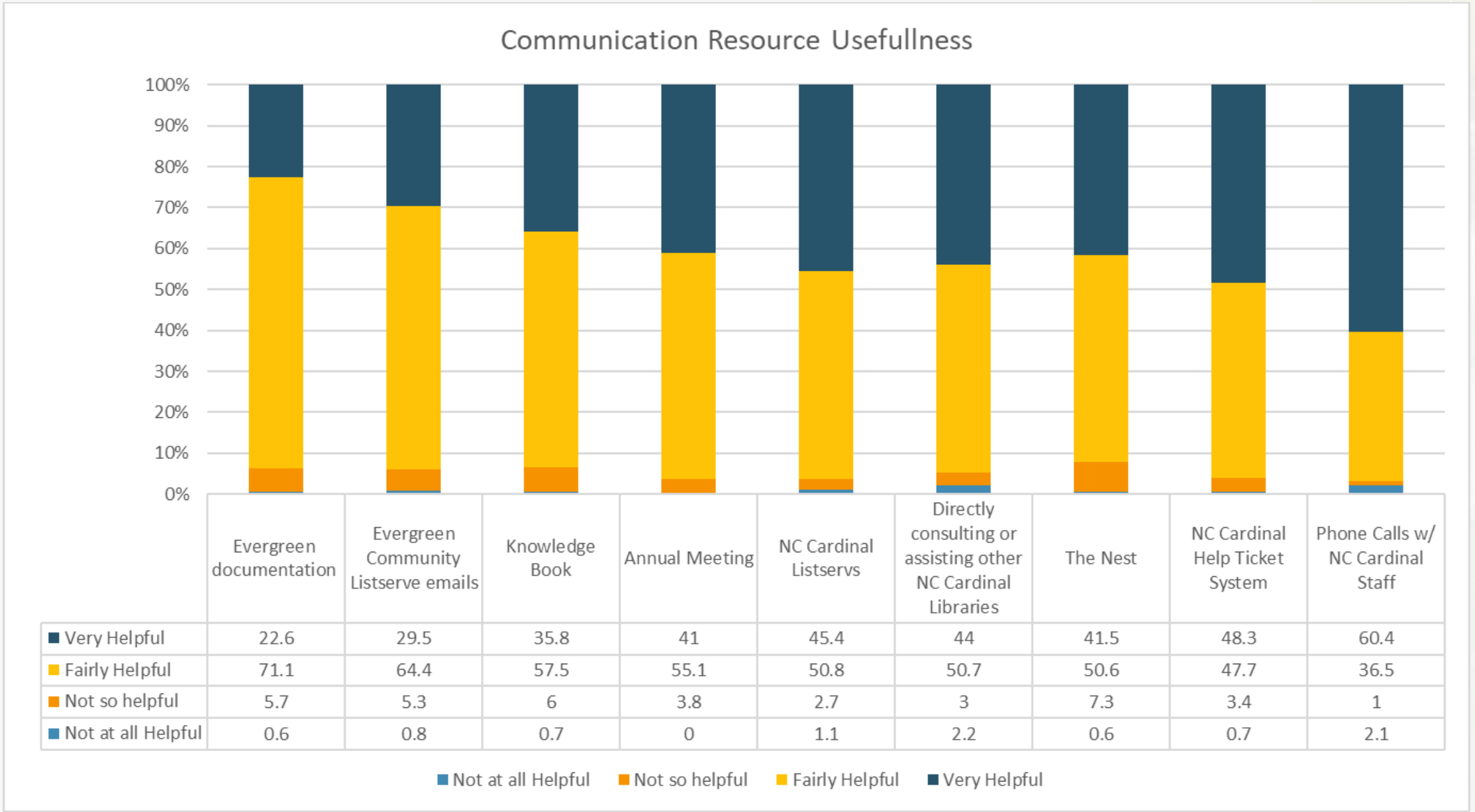
	Audio Visual Deduplication Project	Hosting Migration from Equinox to Mobius	Cataloging Best Practices Training and Assessment Project	Circulation Modifier Consolidation	Student Access Initiative
Very Satisfied	12.1	20.7	18.5	24.6	38
Satisfied	78.4	72.4	71.6	71	58.2
Dissatisfied	6	6.39	9.3	4.4	3.8
Very Dissatisfied	3.4	0	0.6	0	0

How satisfied are you with communications within the NC Cardinal consortium?



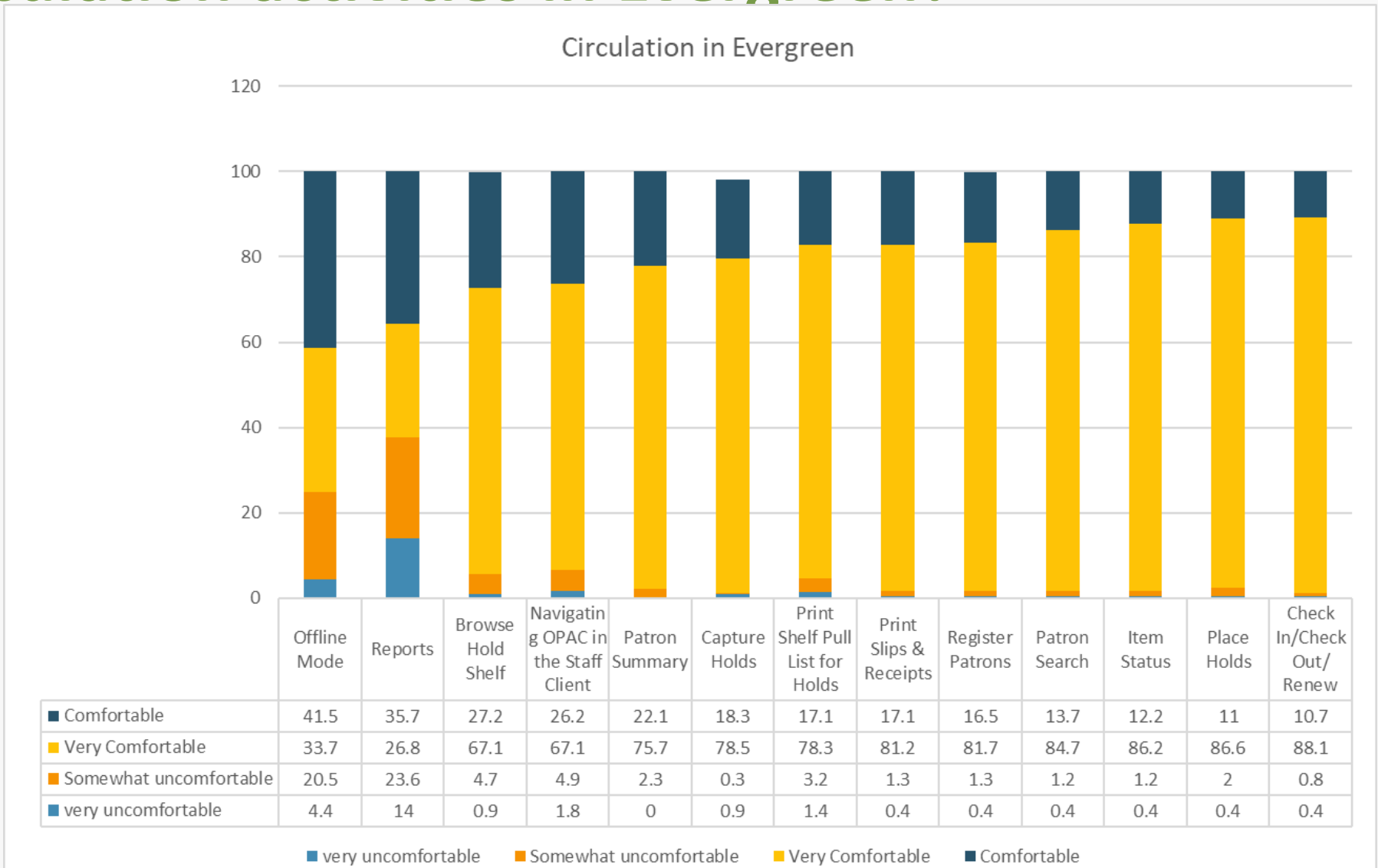
	Project Status/Progress Reports	Committee Activities	Library Administration	Support Activities
Very Satisfied	20.9	21.2	23.9	27.9
Satisfied	75.4	75.4	72.5	68.7
Dissatisfied	3.4	3.4	3.6	3.4
Very Dissatisfied	0	0	0	0

How useful do you find these communication resources?



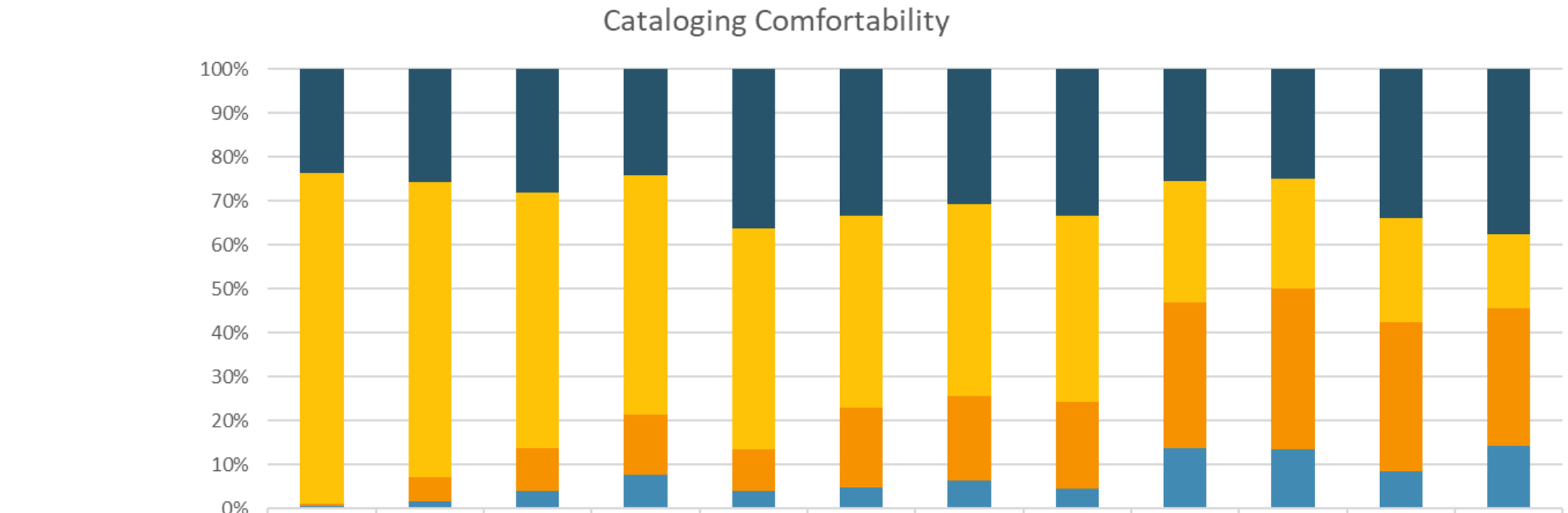
	Evergreen documentation	Evergreen Community Listserve emails	Knowledge Book	Annual Meeting	NC Cardinal Listservs	Directly consulting or assisting other NC Cardinal Libraries	The Nest	NC Cardinal Help Ticket System	Phone Calls w/ NC Cardinal Staff
Very Helpful	22.6	29.5	35.8	41	45.4	44	41.5	48.3	60.4
Fairly Helpful	71.1	64.4	57.5	55.1	50.8	50.7	50.6	47.7	36.5
Not so helpful	5.7	5.3	6	3.8	2.7	3	7.3	3.4	1
Not at all Helpful	0.6	0.8	0.7	0	1.1	2.2	0.6	0.7	2.1

How comfortable are you with using each of these circulation activities in Evergreen?



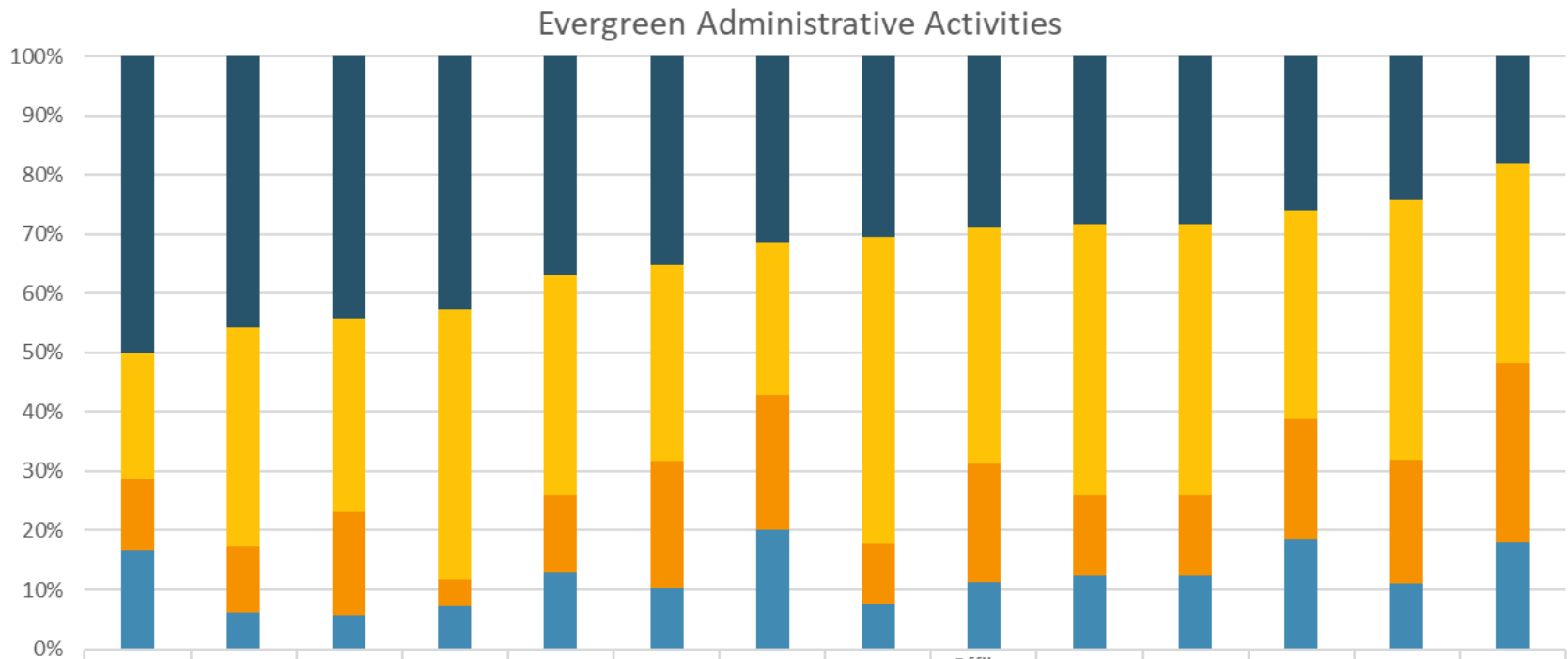
	Offline Mode	Reports	Browse Hold Shelf	Navigating OPAC in the Staff Client	Patron Summary	Capture Holds	Print Shelf Pull List for Holds	Print Slips & Receipts	Register Patrons	Patron Search	Item Status	Place Holds	Check In/Check Out/ Renew
Comfortable	41.5	35.7	27.2	26.2	22.1	18.3	17.1	17.1	16.5	13.7	12.2	11	10.7
Very Comfortable	33.7	26.8	67.1	67.1	75.7	78.5	78.3	81.2	81.7	84.7	86.2	86.6	88.1
Somewhat uncomfortable	20.5	23.6	4.7	4.9	2.3	0.3	3.2	1.3	1.3	1.2	1.2	2	0.8
very uncomfortable	4.4	14	0.9	1.8	0	0.9	1.4	0.4	0.4	0.4	0.4	0.4	0.4

How comfortable are you with using each of these cataloging activities in Evergreen?



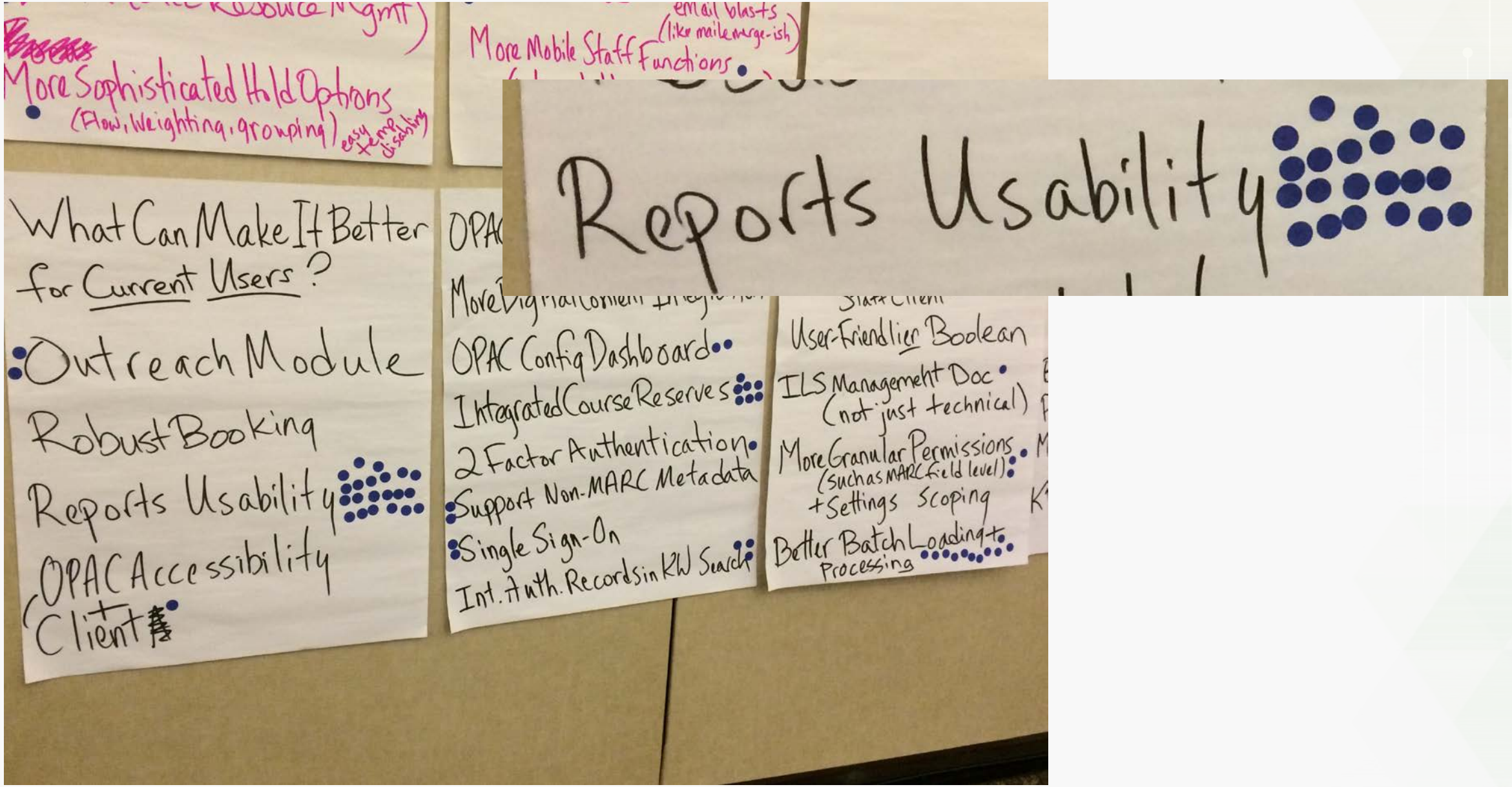
	Item Status	Add/Edit Volumes & Items	Holdings Maintenance	Z39.50	Copy Buckets	Copy/Item Templates	Record Buckets	MARC Editor	MARC Import/Export	MARC Batch Edit	Monograph Parts	Reports
Comfortable	23.5	25.8	28.2	24.2	36.2	33.3	30.8	33.3	25.5	25	33.9	37.7
Very Comfortable	75.4	67.2	58.3	54.5	50.3	43.8	43.6	42.4	27.5	25	23.7	16.9
Somewhat Uncomfortable	0.5	5.5	9.7	13.6	9.4	18.1	19.2	19.7	33.3	36.5	33.9	31.2
Very Uncomfortable	0.5	1.6	3.9	7.6	4	4.8	6.4	4.5	13.7	13.5	8.5	14.3

How comfortable are you with using each of these administrative activities in Evergreen?

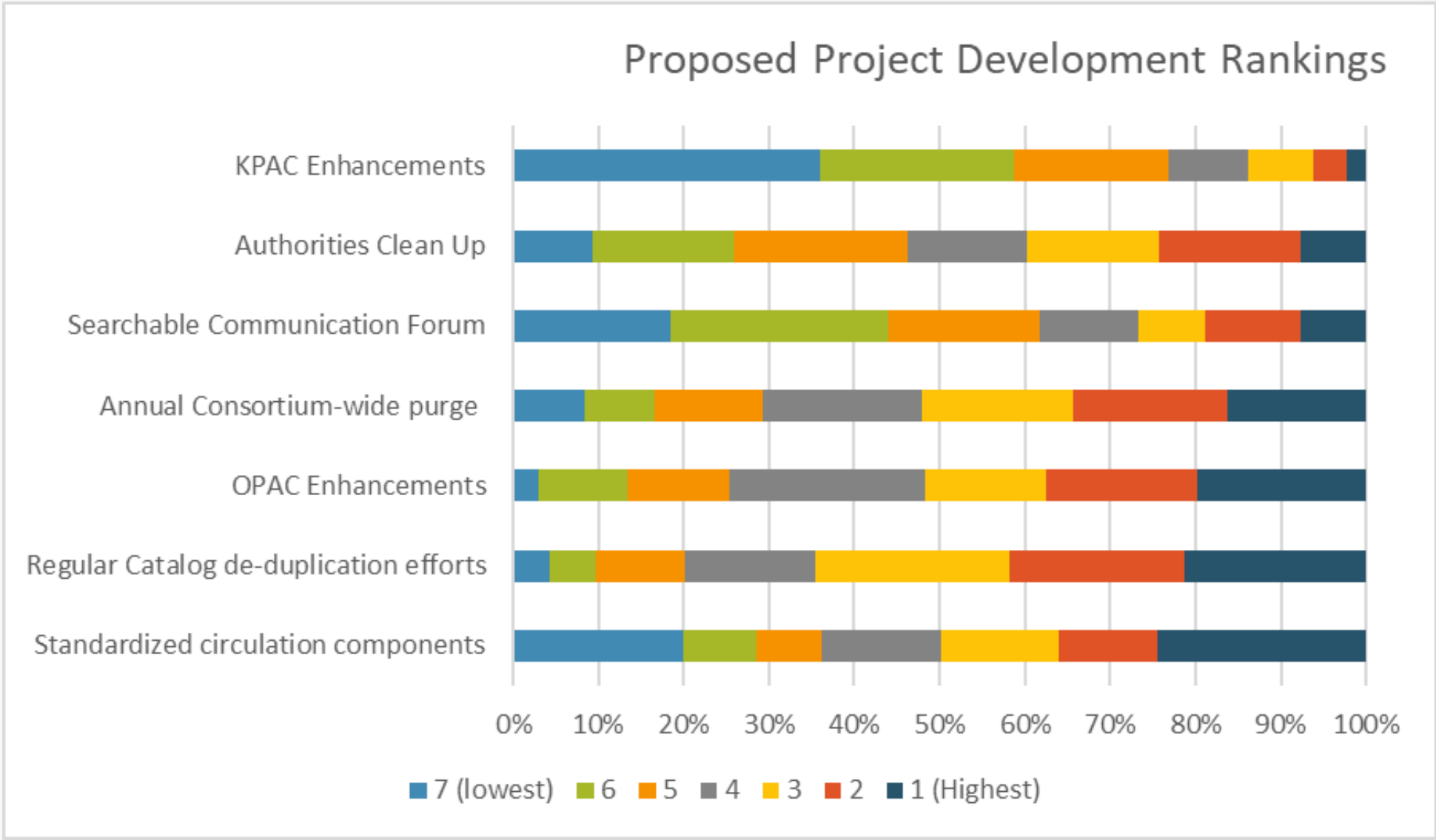


	Closed Dates Editor	Transit List	Cash Reports	Search Preferences	Global Font & Sound Settings	Receipt Templates	Work Logs	Toolbars	Offline Transaction Management	Hotkeys	Non-Catalogued Types	Statistical Categories	Patrons with Negative Balances	Reports
Very Comfortable	50	45.7	44.2	42.7	37	35.2	31.4	30.4	28.8	28.4	28.4	25.9	24.2	18
Somewhat Comfortable	21.4	37	32.7	45.5	37	33	25.7	51.9	40	45.7	45.7	35.2	44	33.7
Somewhat Uncomfortable	11.9	11.1	17.3	4.5	13	21.6	22.9	10.1	20	13.6	13.6	20.4	20.9	30.3
Very Uncomfortable	16.7	6.2	5.8	7.3	13	10.2	20	7.6	11.3	12.3	12.3	18.5	11	18

Reports Usability from Evergreen Conference 2018



Rank these existing and proposed development requests in order of priority to you



The Year Ahead: FY 2018-2019

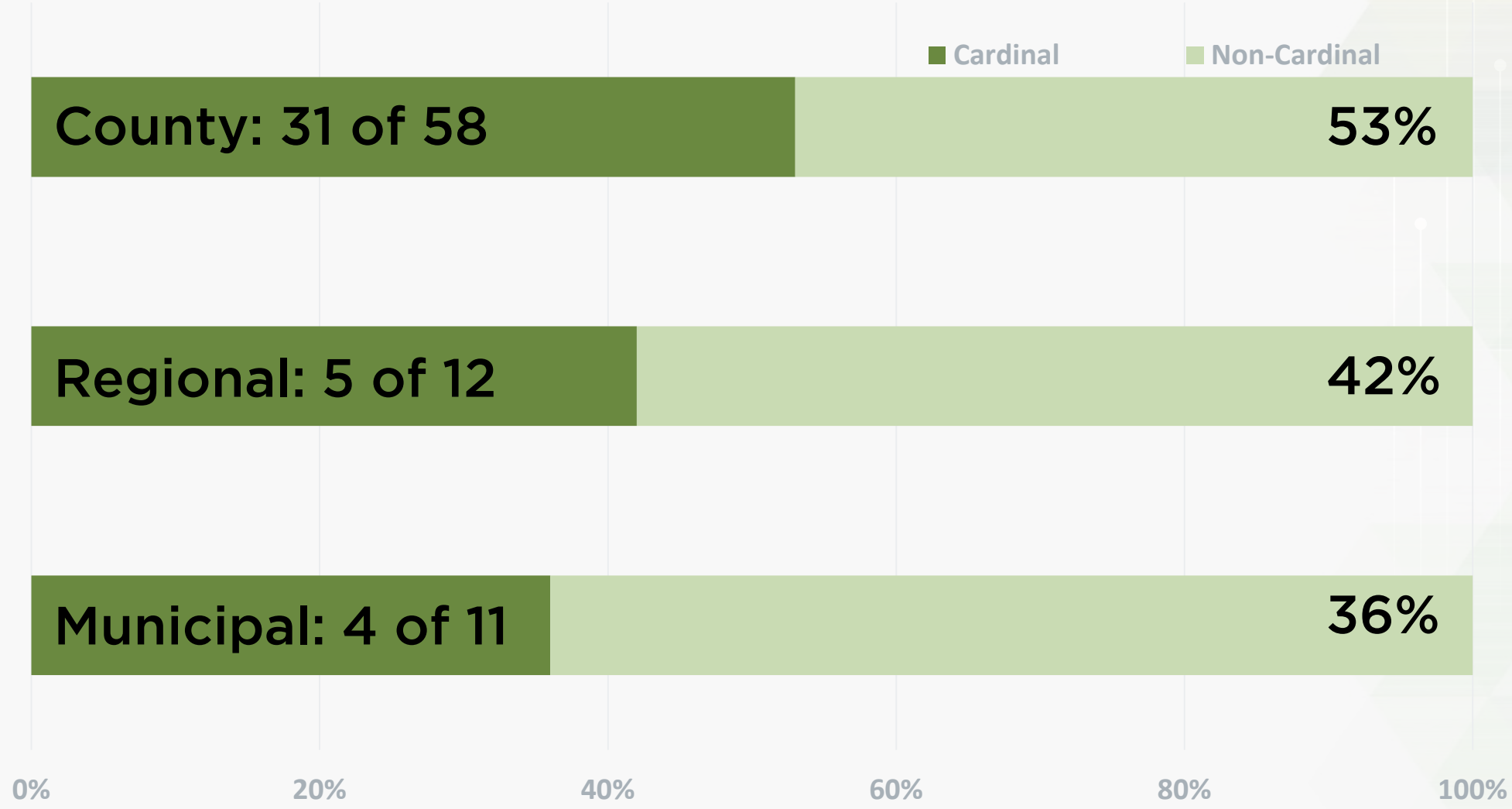
NC Cardinal As Of Fiscal Year 18-19

County
31

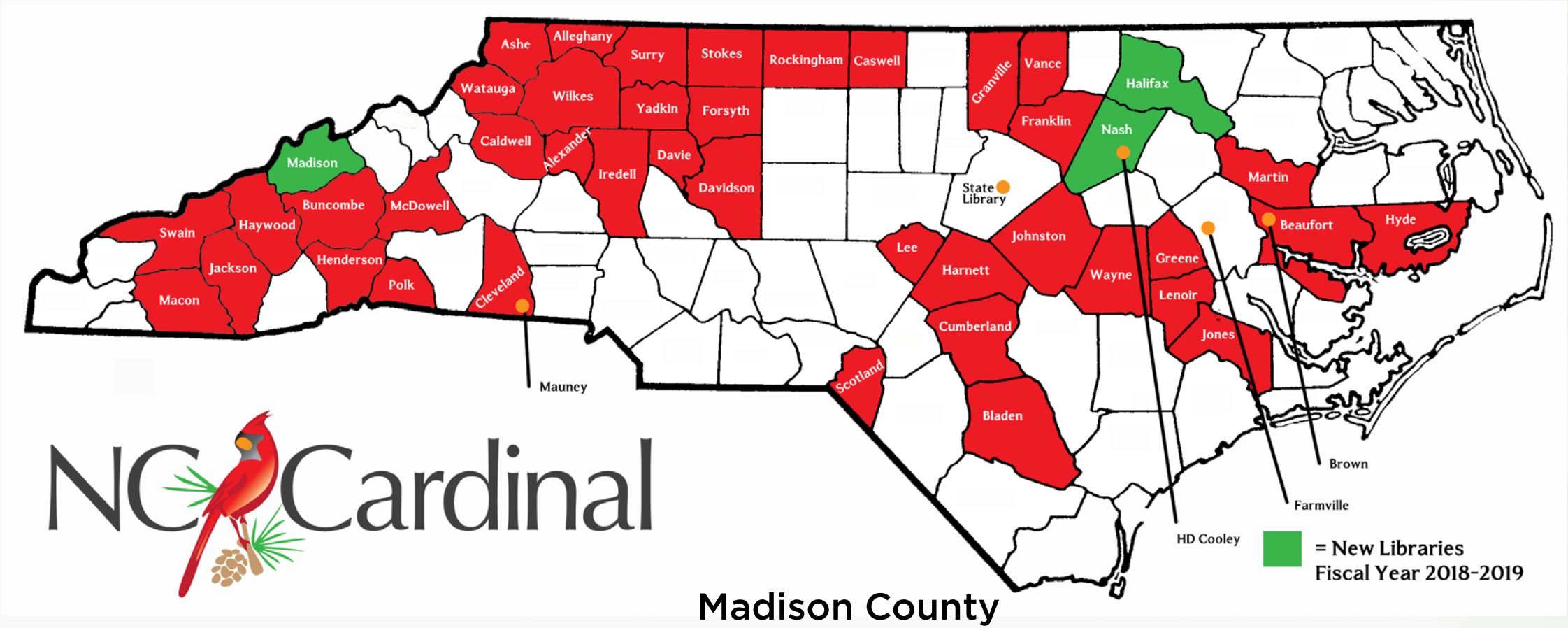
Regional
5

Municipal
4

Special
1



New Member Libraries



NC Cardinal

New Libraries Migrating in FY 2018-2019

Madison County
Halifax County
Braswell Memorial Library
HD Cooley

Projects for the Year Ahead

The Year Ahead

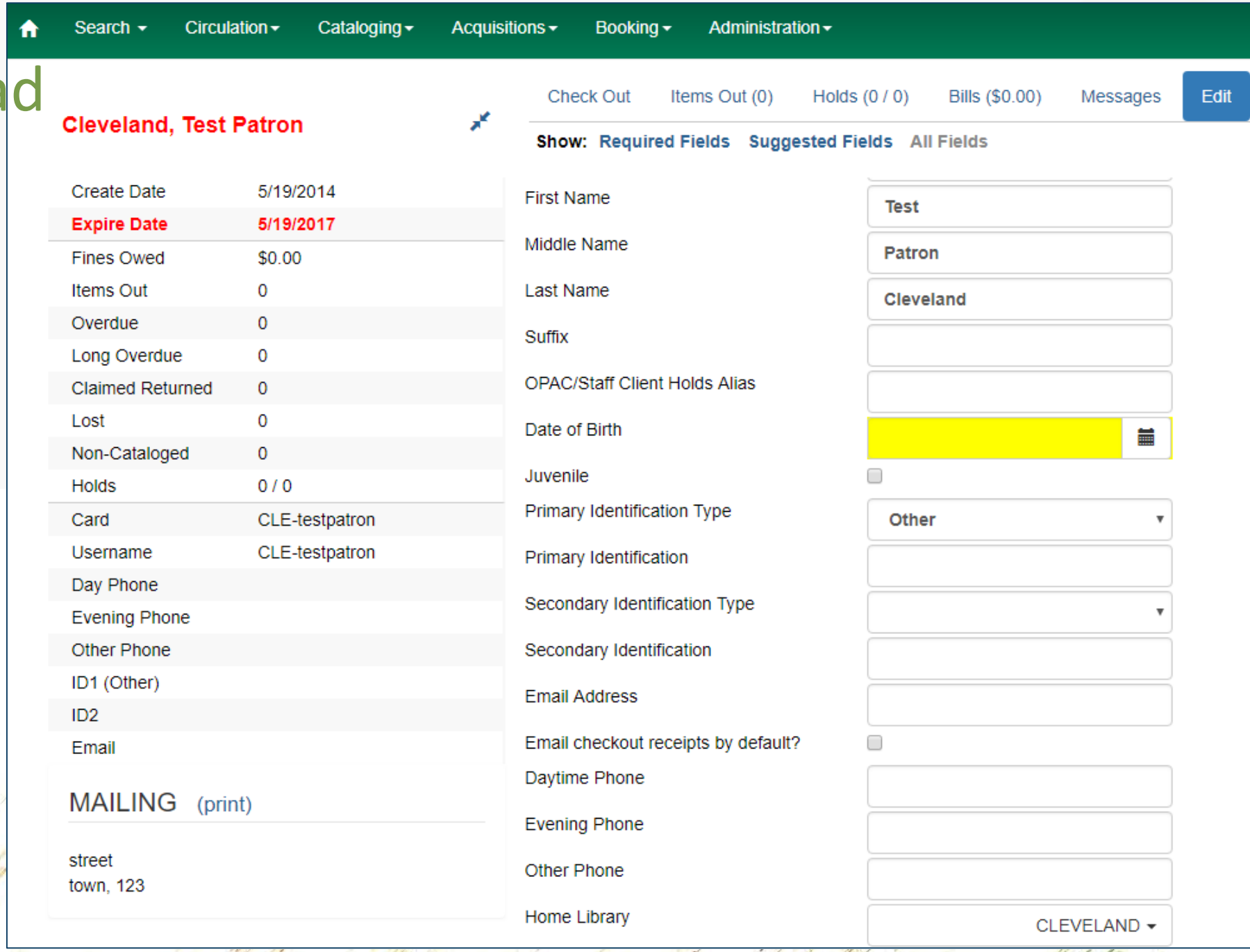
Upgrade to Evergreen version 3.1

Benefits:
Web based client
Numerous bug fixes and developments

Schedule
Staff testing and training
- Now until October

Online training webinars
- August & September

Upgrade to 3.1
- October



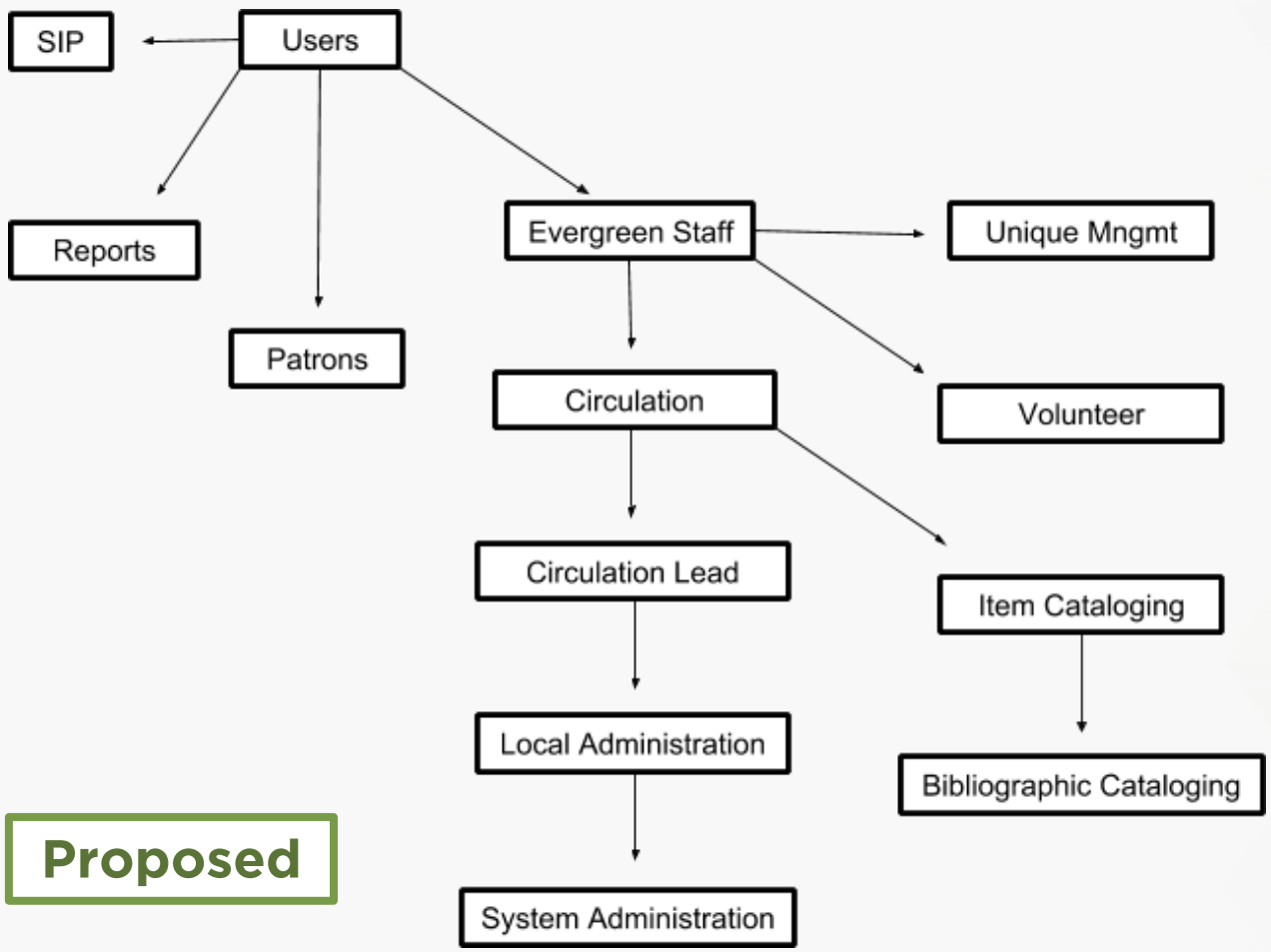
The Year Ahead

FY 2018-2019

Staff Permissions Project

- Permission Groups
  - Users
    - Evergreen Staff
      - Admin Services
        - Data Review
        - Local System Administrator
        - System Administrator
      - Cataloging and Acquisitions
        - Cataloger
          - Acquisitions Staff
        - Cataloging Supervisor
          - Acquisitions Supervisor
      - Circulation
        - Circulation Supervisor
        - Circulator
        - Circulator II
        - Volunteer
      - Global Administrator
      - Unique Mgmt
    - Patron
    - Reports
    - SIP

Current

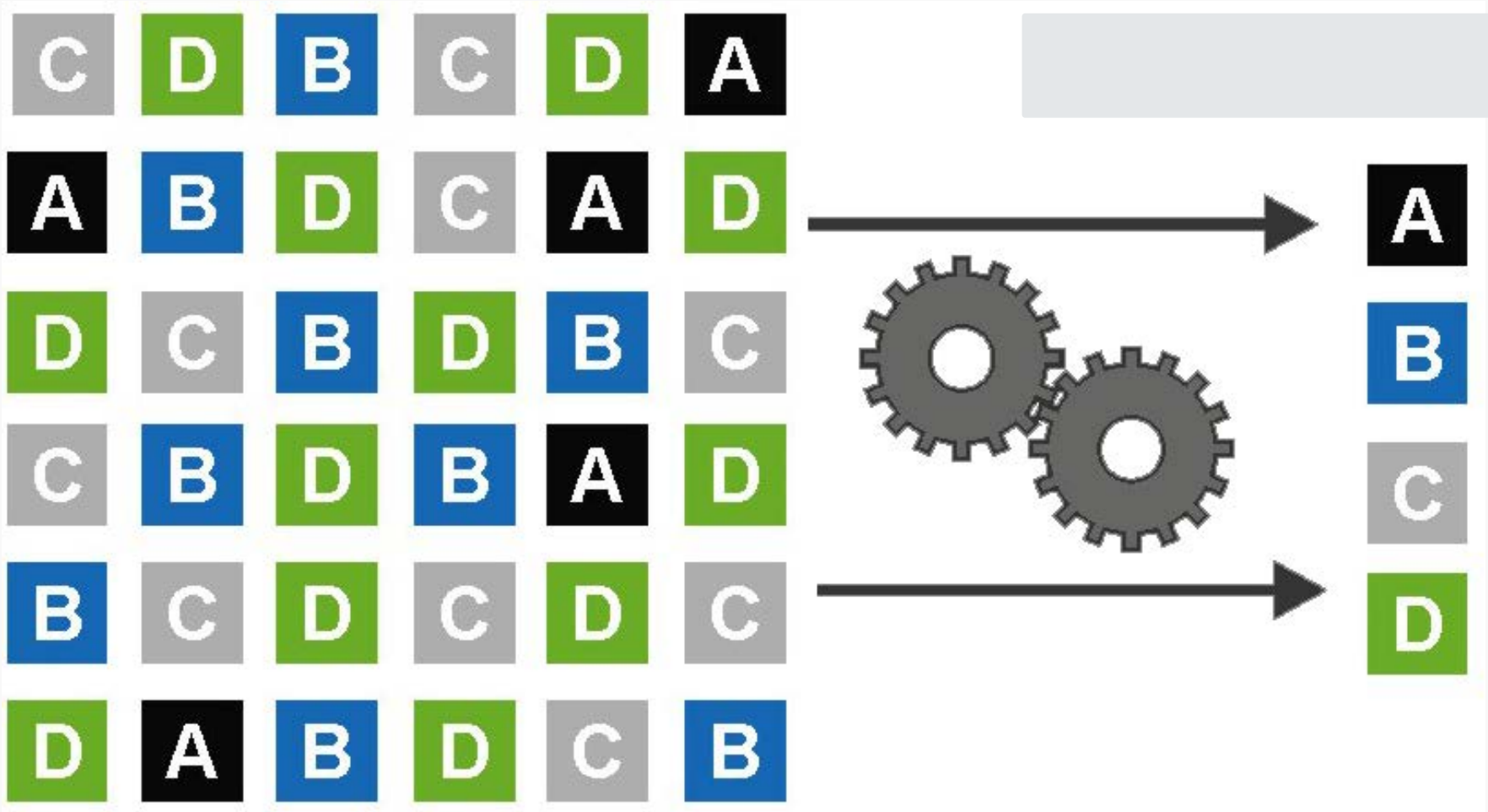


Proposed

The Year Ahead

FY 2018-2019

Book Deduplication Project



https://www.ibm.com/support/knowledgecenter/en/STJKN5_12.0.3/fsa9k196_Deduplication_process.jpg

The Year Ahead

FY 2018-2019

Book Deduplication Project

Dormant Patron Purge

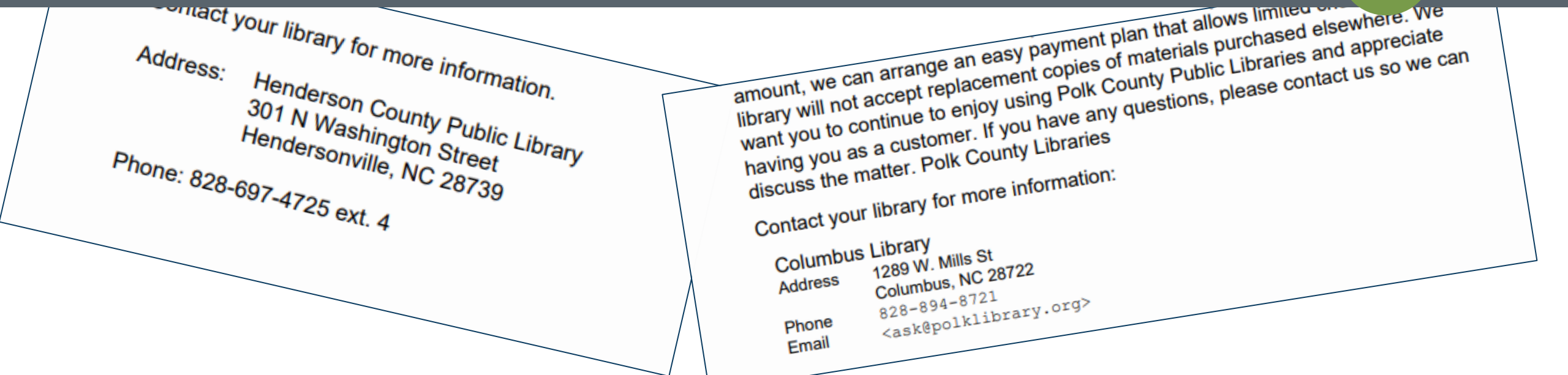
The Year Ahead

FY 2018-2019

Book Deduplication Project

Dormant Patron Purge

Library Notices Update



Proposed Bylaw Change

Proposed Bylaw Change

Section 2d: Effective Date of Withdrawal

Current Language:

"The membership of a Member Library giving written notice on or before June 30 will cease on September 30 of the following State Fiscal Year."

Proposed Language:

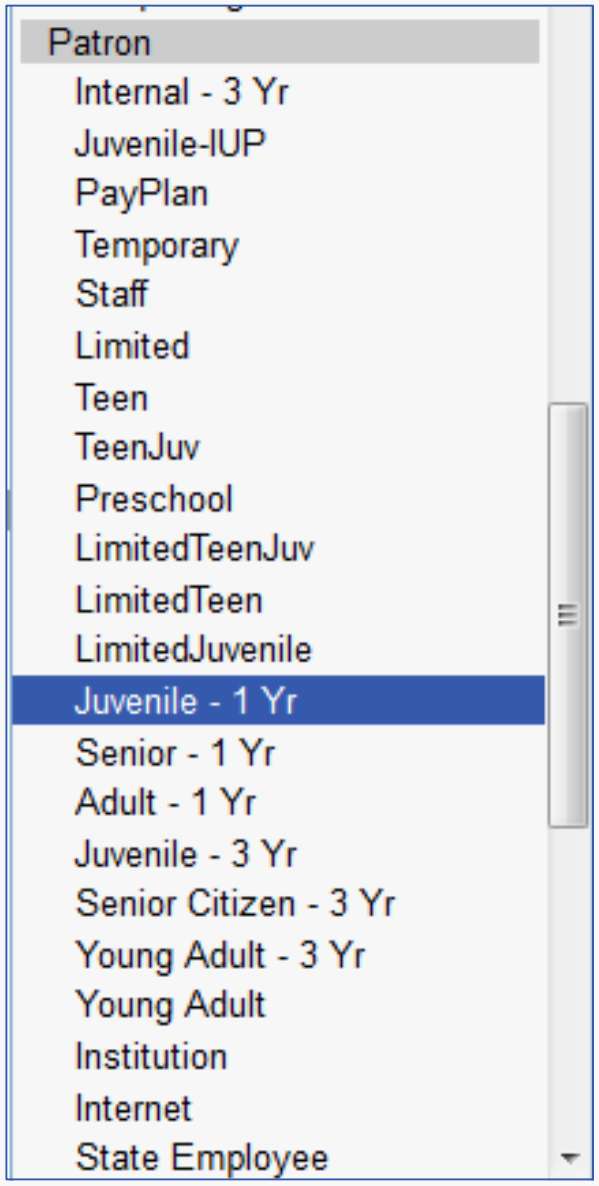
"The membership of a Member Library giving written notice on or before December 31 will cease on June 30 of the following year."

Bylaw changes require a 2/3rds vote from the membership and a thirty (30) days prior written notice to Member Libraries of any proposed amendment.

Bylaw Vote & Lunch Break

Patron Permission Groups

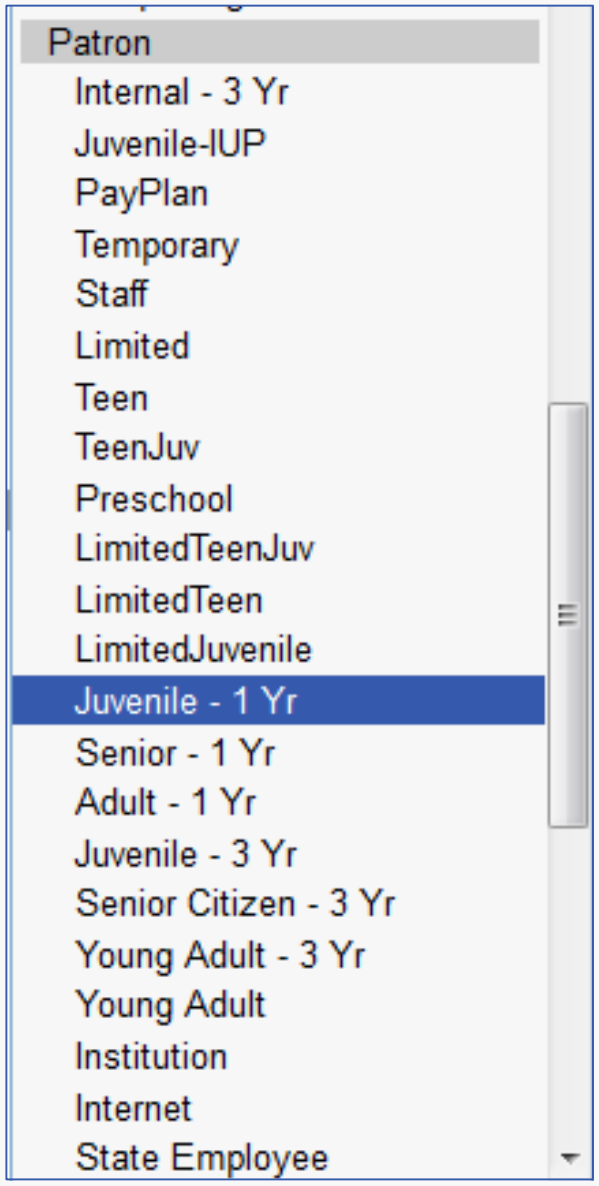
Patron Permission Groups



Why?

- Difficult for staff to select from large list of categories
- Easy to assign groups that your system doesn't have policies for
- Inconsistent category use can result in unexpected behavior if a patron travels to different system
- Variety of overlapping groups is more difficult to administer

Patron Permission Groups



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The Process

- Survey of Libraries
- Functional Analysis of Permission Groups
- Develop Recommendations
- Individual Library System Reports
- Discuss and Decide at Annual Meeting
- Implement, Test and Troubleshoot

Patron Permission Groups

Circulation	Holds	Both

	Adult - 3 Yr	Adult - 1 Yr	Senior - 1 Yr	Senior Citizen - 3 Yr	Adult Limited	Adult newuser	Juvenile - 1 Yr	Juvenile - 3 Yr	Juvenile newuser	Juvenile-IUP	LimitedJuvenile	LimitedJuvenile - 1 Yr	LimitedJuvenile newuser	Teen	Teenluv	Young Adult	Young Adult - 3 Yr	Young Adult newuser	LimitedTeen	LimitedTeenluv	LimitedYA	LimitedYA newuser	School	Limited	Temporary	Internet	Institution	Interlibrary Loan - 3 Yr	Internal - 3 Yr	Outreach	Preschool	PayPlan	College	General	Missing	
Alexander	17228	7		4			1	5461						3	1		32							2	40		86		4	2						22871
Appalachian	34646	23949		18			3249	5319		5303						144	55						19262		12	115	97	2	63	218						92452
BHM	8022	255	33	104	109	4	167	3491	11	20	5			16	4	26	389	3	1	1			7776	5774	1		4		169	3	2			14		26404
Bladen	12	9485	3	1			2790	6			3	216		1	1														41	1			1		12561
Brown Library	14980	61					4	3826																		2			1						18874
Buncombe	81880	58000	3897	5326	4	14	9717	10586	14	9	1	3		54	4	4791	3914	1	1	1		1		1	5140		41		9	8	3		1			183421
Caldwell	8491	29470	1				7852	1902								1	21						1		1		4		7	1						47752
Caswell	8687	5		1			9	2922		2	1	1		3	1	1	25				1					1			30	9				2		11701
Cleveland	76	60	2	7012	5	8	2	12	3	3	1	2		1									15129	88	6				54	21		51	2	50011	1	72550
Cumberland	46407	125601			312	24820	9934	11755	10304		459	1829	1291												15163		124			172		15				248186
Davidson	64773	24	1	9796	6		2	13863	2		82			5515	9317	6	216		109	280	1	1	10075	806		2	3	619	4		4466					119969
Davie	26	15974	4	2	2	1	4378	6		2	1	1		17		1204	8						8271	828	468	1		1	1	57	1			107		31361
Farmville	9377	13	2				73	2127	3	1		2		1			188	1	1				29892	1	1				1							41684
Fontana	28	50791	3		4	2	6264	1	4		25	584		3		2722		1	1		308		10454		543	19757	50		18	1	2					91566
Forsyth	39	145480	344	4	4	21255	23857	7	4607	4	3			18	1	15659	11	1640		2				29		923		1	25					1		213914
Franklin	8	27885			2		9605	4		1															1		16		6	98	26	1				37653
Granville	3	36601	8			45	5873	18	6	6				7	4	1			1						10	1	50			10						42644
Harnett	43297	7310		6	1	6	624	10055	24	3	3	2		49	23	12	2286	3							8		84		18	181	19	1	1277			65292
Haywood	12	32498	258	1		1708	5937	4	524				3	2	1	3	1	2							2	1	280			74						41311
Henderson	63975	493			45	1	52	12807		2	12			1			3						15507	1						311						93210
Iredell	4856	33018	9	1			9695	545						1	1	2	15						28393		12	1	12		2		1			1		76565
Johnston	41367	252	3	16		6	70	7799	11	29	4	3	1	161	79	11	3788	1	4	1				5		1	80	1	7	4	21		1	21		53747
Lee	480	44678	81	42	6	5	13566	139	1	18	2			47	9	30	8		6	5	2		9706	1146	51	1	230		4	72	1			1	1	70338
McDowell	23458	103		3	1	1	15	3978	1	1	1441	4		2	1		33			1			1		388	12	4		4	35				1		29488
SLNC	1223							1									3										254									1481
Neuse	43517	618	2	12	6	1	117	12277	6	15		1		19	8	3	69			2				7	3	160	2		51	35	6	3		1		56941
Northwestern	52647	91	4	16	1	4	32	23374	9	2	1			2	5	1	35	5	3	1				j		1	112	3	5	443	6		1			76804
Perry	5	23583	14				3877	1		2	1														1	63		1								27548
Polk	7444	2						881									3								39	30			6							8405
Rockingham	34134	7				4661	9	9253	1133							11	153	147				1	12315	2			88	738	6	2390		1			4	65053
Scotland	8415	41		1			12	1377			1	1			1		541		1					1					1	114				1		10508
Wayne	68	41142	92	4		2	13406	107	4	17	3	3		57	11	12	5		6	4				3	68	6	27		1	34	2			10		55094
	619581	707497	4761	22370	508	52544	131189	143904	16667	5440	2049	2652	1295	5980	9472	24640	11802	1804	134	299	311	3	166782	8694	21958	21076	1650	1366	496	4335	4557	72	1282	50172	6	

Patron Permission Groups

Functional Analysis

- How does each system uses the existing patron permission groups and user categories?
- What circ or hold rules use the existing permission groups?
- Are the permission groups used for other services like wifi access, electronic resources, PC Reservations, etc.?

Patron Permission Groups

Functional Analysis

- How does each system uses the existing patron permission groups and user categories?
- What circ or hold rules use the existing permission groups?
- Are the permission groups used for other services like wifi access, electronic resources, PC Reservations, etc.?

Strategies for Simplification

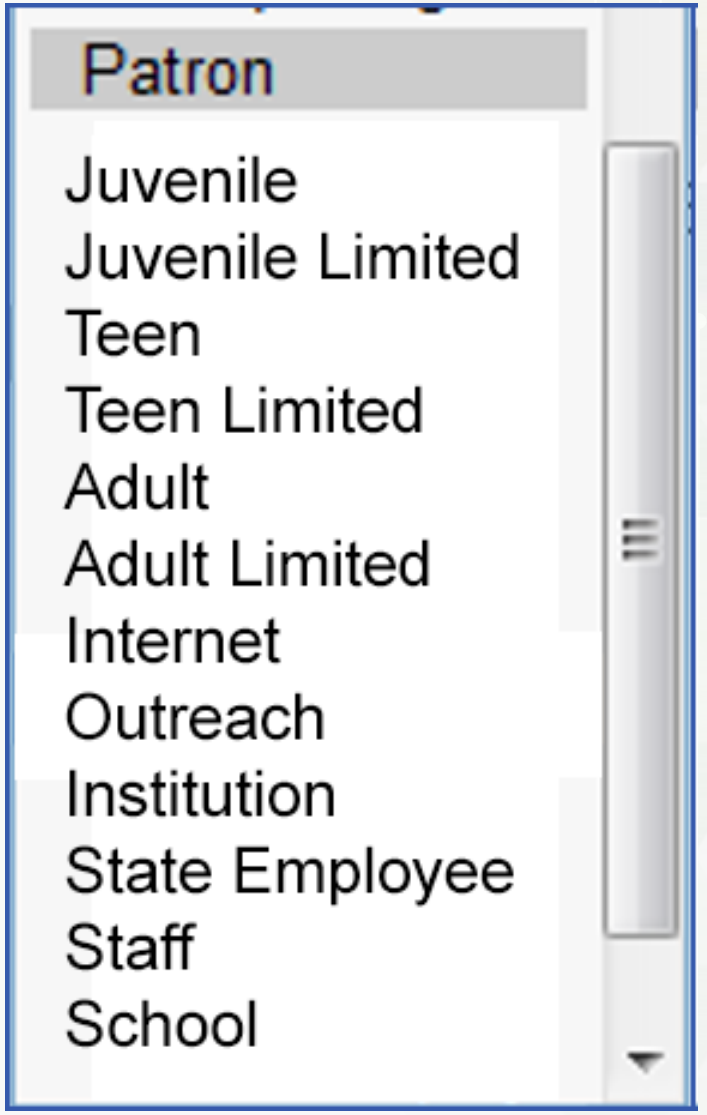
- Separate account behavior from user category to allow different systems to use permission groups differently
- Create Stat Cats if the Permission Group category is for informational purposes rather than circulation or hold rules
- Define circulation rules based on patron age when appropriate

Patron Permission Groups

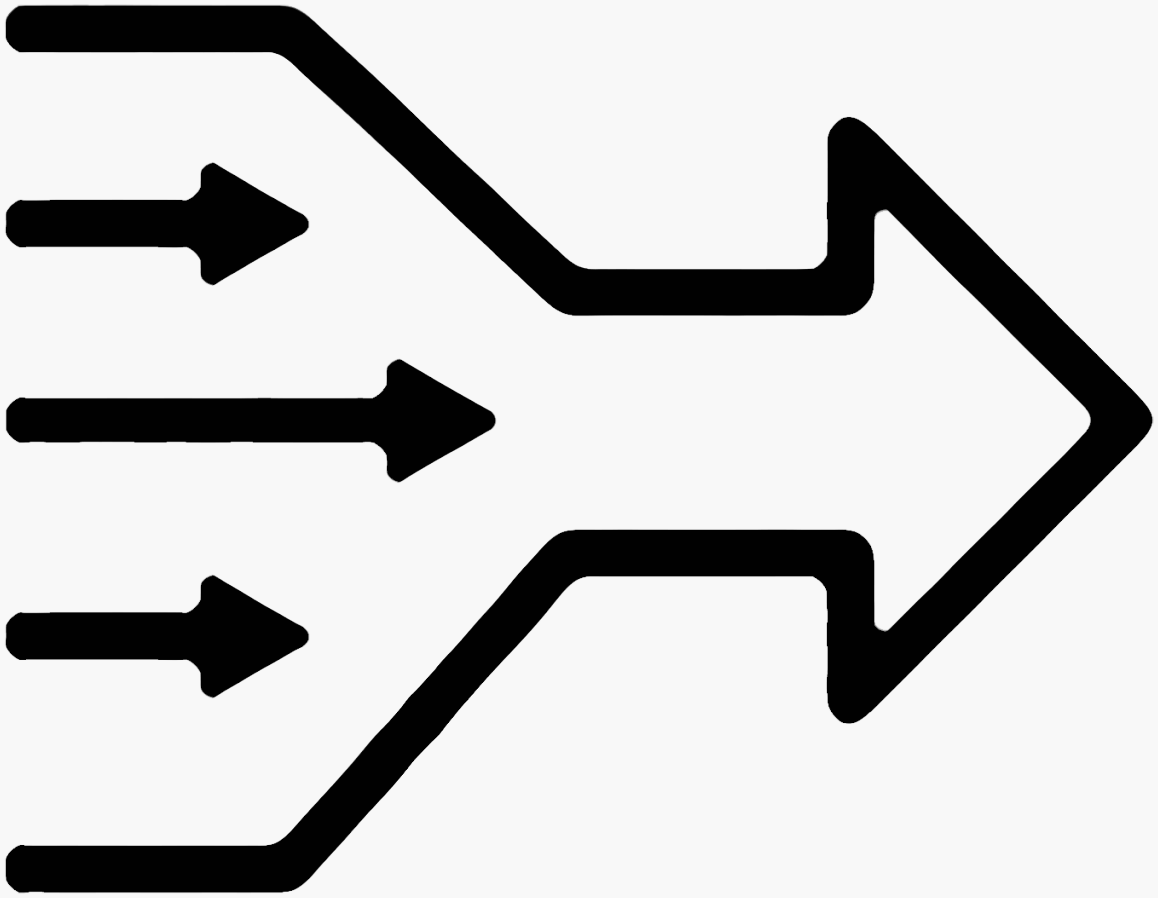
Our Analysis

Age Groups	Limited Functionality
Juvenile	Juvenile Limited
Teen	Teen Limited
Adult	Adult Limited

Accounts Defined By Specific User Relationship or Function	
School	Institution
Outreach	State Employee
Staff	Internet



Patron Permission Groups



Let’s talk about these changes category by category and vote on how to make changes

Patron Permission Groups

School

Old Permission Group	New Permission Group	Notes
School	School	No change

Staff

Old Permission Group	New Permission Group	Notes
Staff	Staff	No change. These accounts are intended for individual staff members that need to check out books for work. You may also want to consider using an Institution account if the account is for something like children's reading time. These accounts are not for logging into Evergreen's staff client.

State Employee

Old Permission Group	New Permission Group	Notes
State Employee	State Employee	No change

Patron Permission Groups

Internet

Old Permission Group	New Permission Group	Notes
Internet	Internet	No change
Temporary	Internet	Largest user of this type used it for Internet only accounts. Otherwise we're proposing that accounts could changed to [Age Group Name] Limited

Patron Permission Groups

Outreach

Old Permission Group	New Permission Group	Notes
Outreach	Outreach	No change. We're suggesting more usage of stat classes to define the variety of institutions that these accounts are for.
Preschool	Outreach	Primarily used by only one system which has no rules for Outreach and no Outreach patrons, so Outreach circulation rules could be created to match their current Preschool rules

Patron Permission Groups

Institution

Old Permission Group	New Permission Group	Notes
Institution	Institution	No change. We're suggesting more usage of stat classes to define the variety of institutions that these accounts are for.
Interlibrary Loan - 3 Yr	Institution	Only one system has rules for both Institution and Interlibrary Loan - 3 Yr. so we'd like to collapse these into simply Institution and add an Interlibrary Loan stat cat
Internal - 3 Yr	Institution	Only one system has rules for both Institution and Internal - 3 Yr. so we'd like to collapse these into simply Institution and add an Internal stat cat. Alternatively, if this is for a staff member, the permission group Staff could be used.

Patron Permission Groups

Adult & Adult Limited

Old Permission Group	New Permission Group	Notes
Adult - 3 Yr	Adult	
Adult - 1 Yr	Adult	
Senior - 1 Yr	Adult	Only 1 system uses this for a circulation rule. Rule could be recreated by adding policy for Adult users aged 61-105
Senior Citizen - 3 Yr	Adult	Only 3 systems use this for a circulation rule. Rule could be recreated by adding policy for Adult users aged 61-105
Adult Limited	Adult Limited	
Adult newuser	Adult Limited	Only one system has a policy that uses this permission group, but no corresponding policy for Adult Limited, so current functionality could be maintained by combining these two groups

Patron Permission Groups

Adult & Adult Limited

Old Permission Group	New Permission Group	Notes
Adult - 3 Yr	Adult	
Adult - 1 Yr	Adult	
Senior - 1 Yr	Adult	Only 1 system uses this for a circulation rule. Rule could be recreated by adding policy for Adult users aged 61-105
Senior Citizen - 3 Yr	Adult	Only 3 systems use this for a circulation rule. Rule could be recreated by adding policy for Adult users aged 61-105
Adult Limited	Adult Limited	
Adult newuser	Adult Limited	Only one system has a policy that uses this permission group, but no corresponding policy for Adult Limited, so current functionality could be maintained by combining these two groups

Patron Permission Groups

Old Permission Group	New Permission Group	Notes
Juvenile - 1 Yr	Juvenile	
Juvenile - 3 Yr	Juvenile	
Juvenile newuser	Juvenile Limited	
Juvenile-IUP	Juvenile Limited	No circ or hold rules based on this permission group
LimitedJuvenile	Juvenile Limited	
LimitedJuvenile - 1 Yr	Juvenile Limited	
LimitedJuvenile newuser	Juvenile Limited	
Teen	Teen	
TeenJuv	Teen	
Young Adult	Teen	
Young Adult - 3 Yr	Teen	
Young Adult newuser	Teen Limited	
LimitedTeen	Teen Limited	No circ or hold rules based on this permission group
LimitedTeenJuv	Teen Limited	
LimitedYA	Teen Limited	No circ or hold rules based on this permission group
LimitedYA newuser	Teen Limited	No circ or hold rules based on this permission group

Juvenile & Juvenile Limited / Teen & Teen Limited

Patron Permission Groups

Discontinued Permission Groups

Old Permission Group	New Permission Group	Notes
Limited		Users would be changed to [Age Group Name] Limited accounts, or could be changed to Internet accounts if the accounts were only for internet access
College	Adult	Convert to stat class. Only one system has circulation or hold rules for this group, but they have no users assigned to this group.
General		Primarily used by one system which has agreed to age based permission group categories. Otherwise we'd change the accounts to [Age Group Name] permission group based on the date of birth of the user
Missing		Should be an item status, not an account type
PayPlan		Only one system has circulation rules based on this permission group and we believe the functionality desired could be facilitated through other means

Strategic Planning

NC Cardinal Strategic Plan

Mission Statement: Amplify access and engage collaborators in coalition to build capacity in North Carolina

Guiding Principles

- **Community**… we are an inclusive community that respects our broad diversity and freely shares our knowledge, expertise, and experiences
- **Service**… we are grateful for the work of libraries and appreciate their impacts in communities; our customer-first philosophy prioritizes services to and for patrons and library staff
- **Responsibility**… we are committed to transparency in stewardship of public library funding and maximizing the return on investment for all citizens
- **Innovation**… we embrace calculated risk, evaluate and integrate emerging technologies, and use strategic perspective to evolve our services to meet the changing needs in member communities

NC Cardinal Strategic Plan

Build Sustainability

- **Build an operational and funding model that incrementally creates organizational self-sustainability**

NC Cardinal Strategic Plan

Build Sustainability

- Build an operational and funding model that incrementally creates organizational self-sustainability

- Enhance network infrastructure

NC Cardinal Strategic Plan

Build Sustainability

- Build an operational and funding model that incrementally creates organizational self-sustainability

- Enhance network infrastructure

- Strategically grow membership and migrations into the consortium

NC Cardinal Strategic Plan

Build Sustainability

- **Clarify member responsibilities for member engagement**

NC Cardinal Strategic Plan

Build Sustainability

- Clarify member responsibilities for member engagement

- Expand governance capacity by diversifying the Governance Committee and convening advisory forums

NC Cardinal Strategic Plan

Build Sustainability

- Clarify member responsibilities for member engagement
- Expand governance capacity by diversifying the Governance Committee and convening advisory forums
- Assess resource-sharing operations and practices to optimize cost and benefit

NC Cardinal Strategic Plan

Fortify organizational infrastructure

Continue to build communication channels for membership and staff

NC Cardinal Strategic Plan

Fortify organizational infrastructure

Continue to build communication channels for membership and staff

Expand training experiences and resources for membership and staff

NC Cardinal Strategic Plan

Fortify organizational infrastructure

- Continue to build communication channels for membership and staff
- Expand training experiences and resources for membership and staff
- Become an independent nonprofit organization

NC Cardinal Strategic Plan

Fortify organizational infrastructure

- Continue to build communication channels for membership and staff
- Expand training experiences and resources for membership and staff
- Become an independent nonprofit organization
- Leverage expertise and best practices

NC Cardinal Strategic Plan

Fortify organizational infrastructure

- Continue to build communication channels for membership and staff
- Expand training experiences and resources for membership and staff
- Become an independent nonprofit organization
- Leverage expertise and best practices
- Assess support operations and provide more self-service administration tools

NC Cardinal Strategic Plan

Strategically explore new service offerings

Consider services that remove barriers and delight users

NC Cardinal Strategic Plan

Strategically explore new service offerings

Consider services that remove barriers and delight users

Identify service offerings based upon member needs and interests

NC Cardinal Strategic Plan

Create collaborations and coalitions: cultivate synergistic collaborations with ecosystem

Engage more deeply in the Evergreen open source community

NC Cardinal Strategic Plan

Create collaborations and coalitions: cultivate synergistic collaborations with ecosystem

Engage more deeply in the Evergreen open source community

Seek potential new partnerships and leverage relationships with existing entities

Thank You!