NC Cardinal
General Membership Meeting
June 14, 2016

Agenda

I. Welcome

II.   FY2015-16: Year in Review

III.   FY2016-17: Upcoming Activities

IV.   Working Groups

FY 2015-2016

Year in Review

Year in Review

Personnel Changes

- Tanya Prokrym – Became Chief, Library Development

- Catherine Prince – Hired Helpdesk Technician

Year in Review

ILS Statistics

- Total Active Patrons – *1.6 million*
- Total Item Count – *5.8 million*
- Total Bib Count – 1.8 million

Year in Review

- *35* Counties

- *27* Library Systems (*34%* of NC library systems)
    - *3* Municipalities
    - *5* Regional Libraries – June 2016

- 116 Branch Libraries

Serving 35% of State Population

Year in Review

- Upgrade –
  - o 2.9.4 upgraded on May 25th
- Test Server synchronization

Upgrade Issues

	GA PINES	NC Cardinal
Items	10.6 million	5.8 million
Patrons	2.4 million	1.8 million
Branches	285	116
Transits	632,540	1.6 million

Year in Review

Evergreen Conference

- April 19 – 23, 2016; Raleigh
- Hosted by NC Cardinal and member libraries
- 27 Scholarships
- 230 attendees from 28 states and Canada

Year in Review

- Susan Craven (Davidson)
- Nicole de Bruijn (Appalachian)
- Jonathan Furr (Forsyth)
- Wayne Hunt (Franklin)
- Carine Mattix (Appalachian)
- Jennifer Weston (Davidson)

Thank you to all who volunteered!

Year in Review

Migrated Library systems 2015-2016 :

1. Neuse
2. Henderson
3. Iredell
4. Alexander
5. Johnston

Year in Review

CATALOGING COMMITTEE

Cataloging Committee

Incoming members
- Christina Martin – Mauney
- Jonathan Furr – Forsyth
- Forest Doyle – Buncombe

Outgoing members
- David Miller – Farmville
- Marion Waters – Wayne
- Joe Barbee – Davie

Cataloging

- Cataloging & general pre-migration assessments for incoming libraries
- Individual staff user accounts for migrating libraries (coming for existing libraries)
  - Cataloging
  - Acquisitions
  - Admin

Catalog Deduplication

- June – July 2016
  - Equinox provides scripts and reports
  - Testing by cataloging volunteers
- July – August 2016
  - Finalize scripts
  - Run de-duplication process
  - Evaluate

Cataloging Training

Cataloger Training and Assessment

- First series
  - 10 targeted videos
  - Released monthly
    - You Tube channel
    - Nest
  - Video demo

Cataloging Training

Cataloger Training and Assessment

- January 2017 - Assessment on first 5
  1. Search for bib
  2. Add item to existing bib
  3. Improve bib record
  4. Create copy templates
  5. Monographic parts

Cataloging Training

- Continuing Education classes
  - Tackling A/V in RDA – 29 attendees
  - Cataloging Serials in RDA – 24 attendees
  - Catching Up with Cataloging – 19 attendees

Reports Training

Intermediate Reports in-person training

October 2015 – 3 locations

- Buncombe County – 13 attendees
- Davidson County – 14 attendees
- Wayne County – 14 attendees

Year In Review

RESOURCE SHARING COMMITTEE

Resource Sharing Task Force

New committee members

- Jennifer Weston – Davidson
- Carine Mattix – ARL

Rotated off

- Wayne Hunt – Franklin
- Nathan McGehee - Lee

Resource Sharing Task Force

Current Committee Members:

1. Angela McCauley – Harnett
2. Kimberly Davenport – Brown
3. Caroline Roten – Haywood
4. Lise Keppler – Forsyth
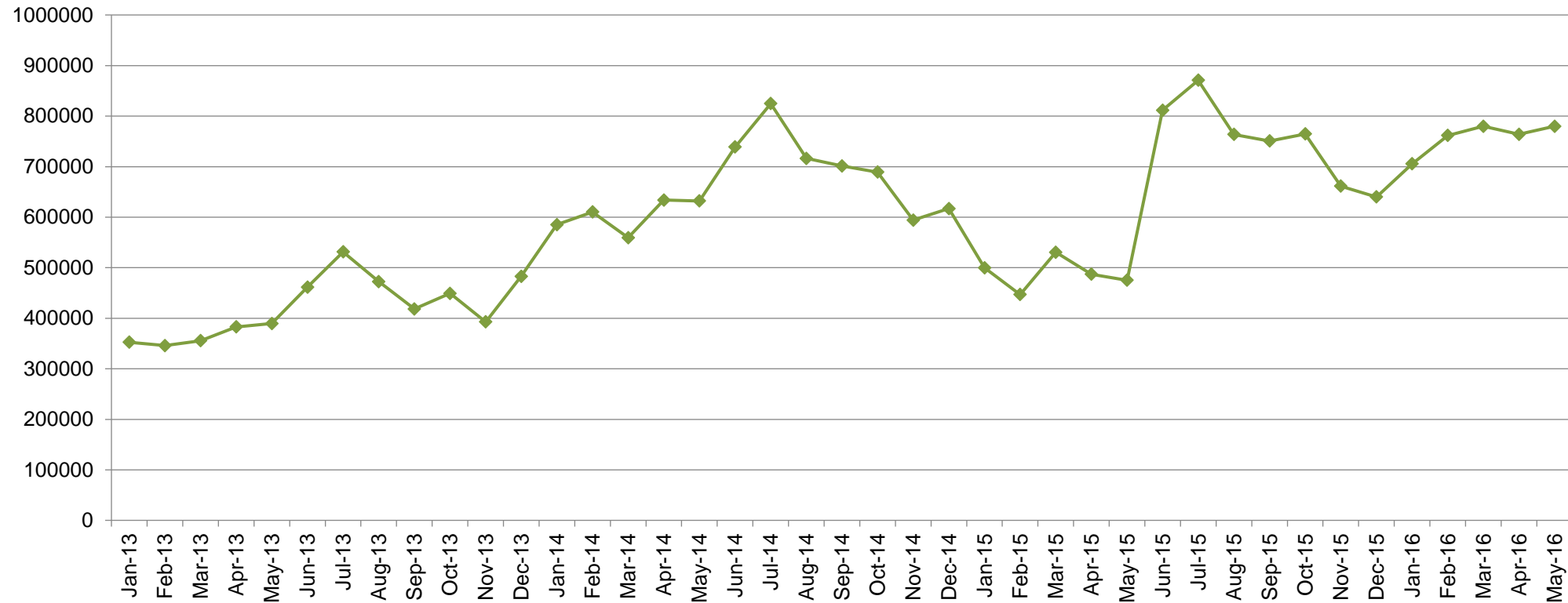5. Jennifer Weston – Davidson
6. Carine Mattix – ARL

Resource Sharing Activities

- Discussions with STAT courier service – state-wide delivery service (strategic plan)
- Revamping Shipping Contact list
- UPS address book import/export
- Create primary / secondary contact list

FY 2015-2016

Resource Sharing Data

Checkouts – 2013 to May 2016

Total Circs since Cardinal Inception – 30,419,230

Transit Data – 3 Year Totals

	Total Transits	Average Transits	% Increase
2013	1,087,165	90,597	
2014	1,550,343	129,195	29.9%
2015	1,631,119	144,124	5%

Transit Data – 3 Year Totals

	Total *Intra -* Transits	Total *Inter-* Transits	% Increase *Inter* - transits
2013	921,760 (84.8%)	165,405 (15.2%)	
2014	1.23 Million (84%)	239,994 (16%)	31.08% ⬆
2015	1.12 Million (68.6%)	511,913 (31.4%)	53.12% ⬆

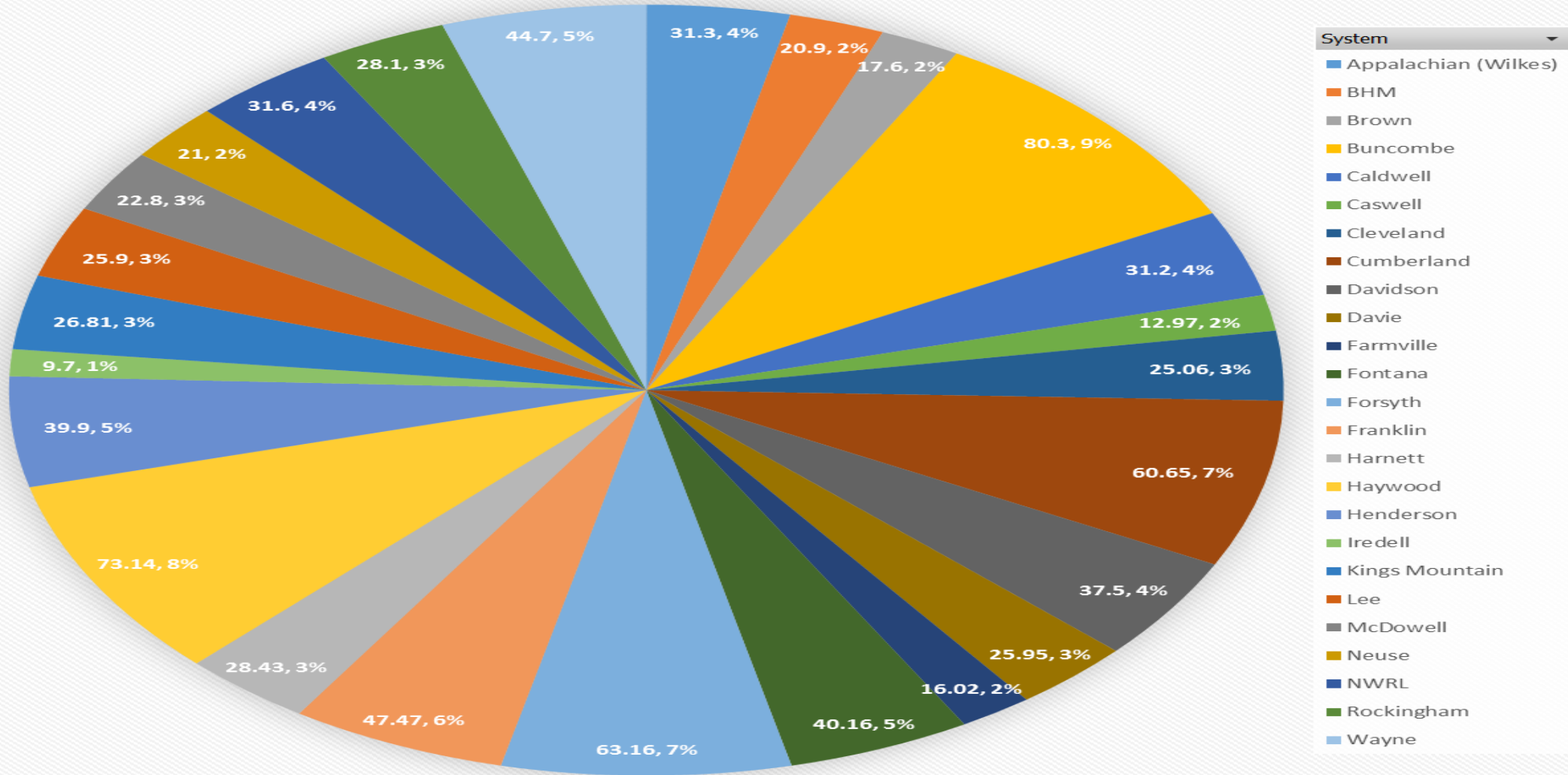# Transits – 2013 to May 2016
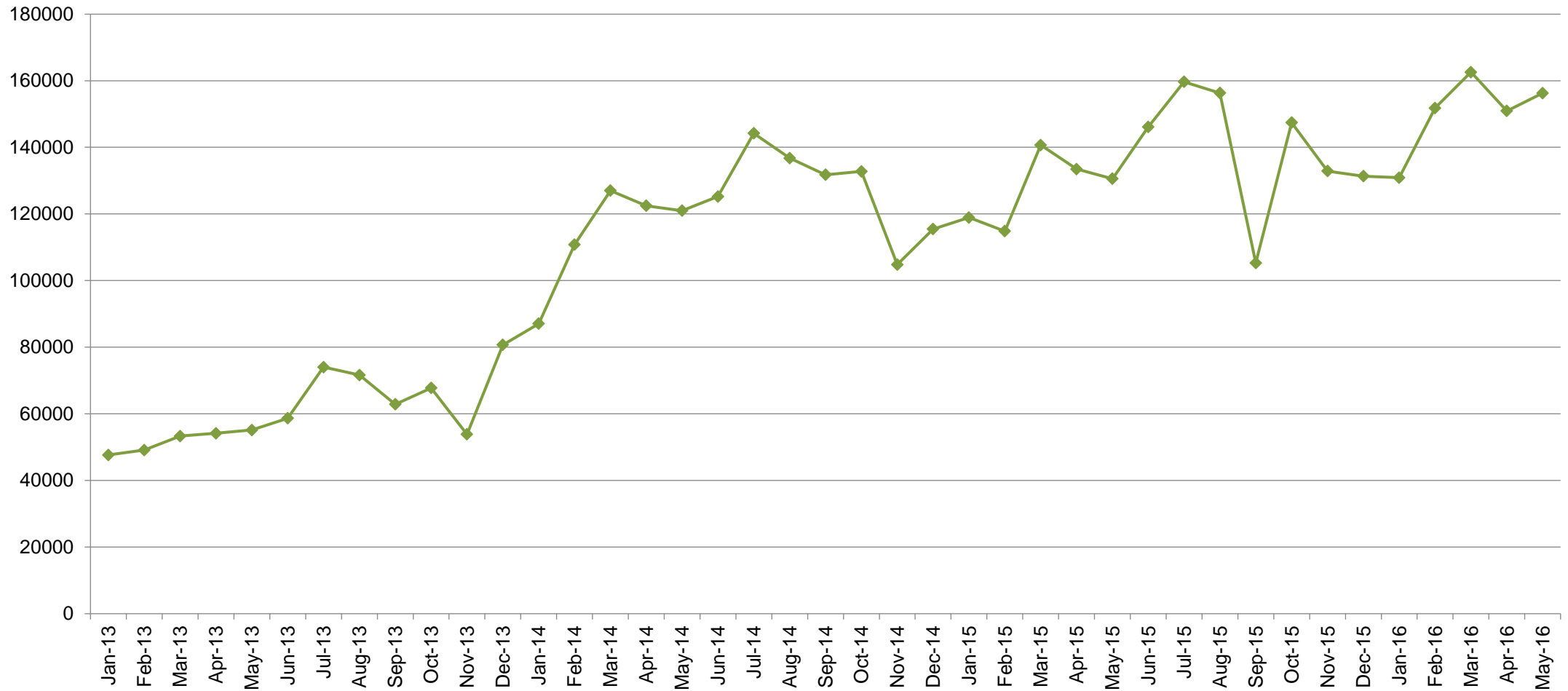
Transit Data – 3 Year Totals

	Total Costs	Average Monthly Costs?? Per library?	% Increase
2013	$117,450	$9,787	
2014	$161,252	$13,437	27%
2015	$215,396	$19,581	25%

Resource Sharing Costs
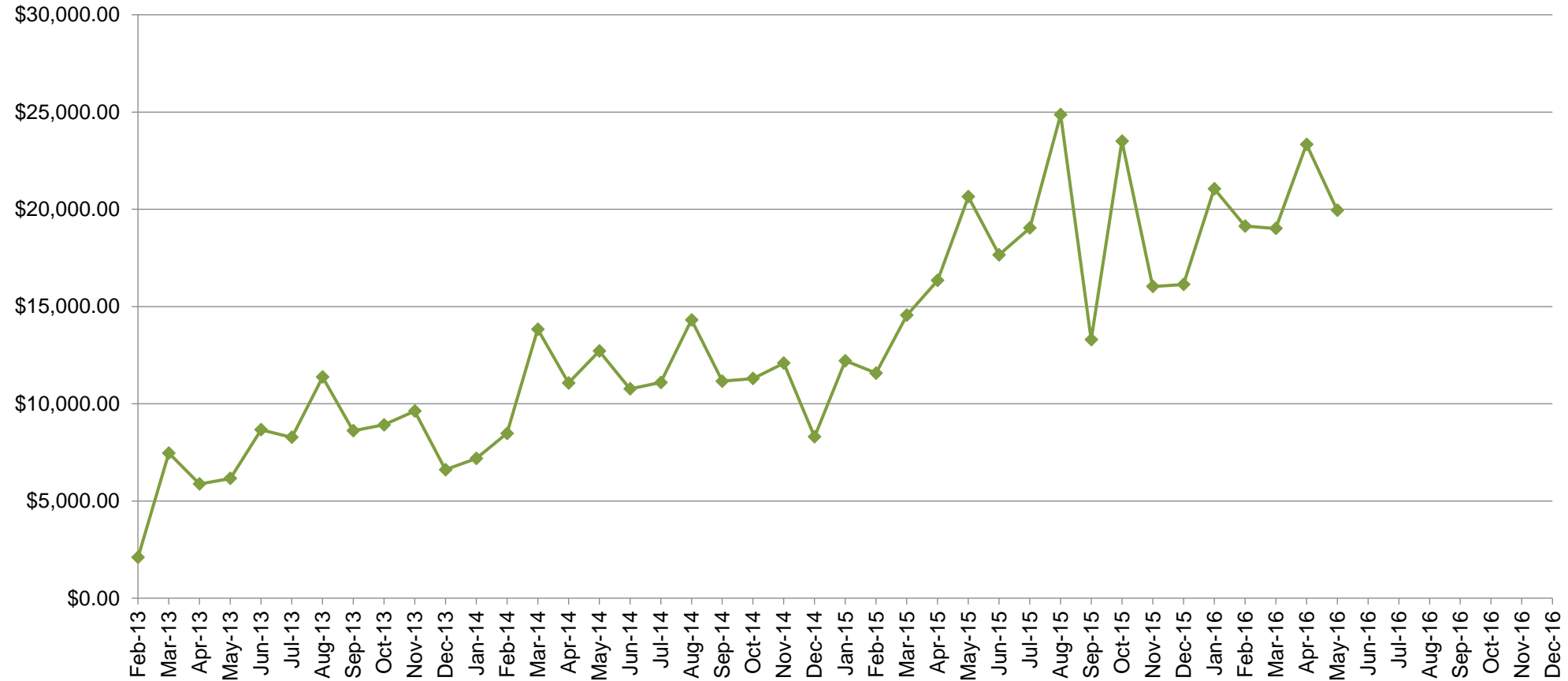
2015 Resource Sharing – Packages Sent – Weekly Average

Year in Review

Support and Maintenance
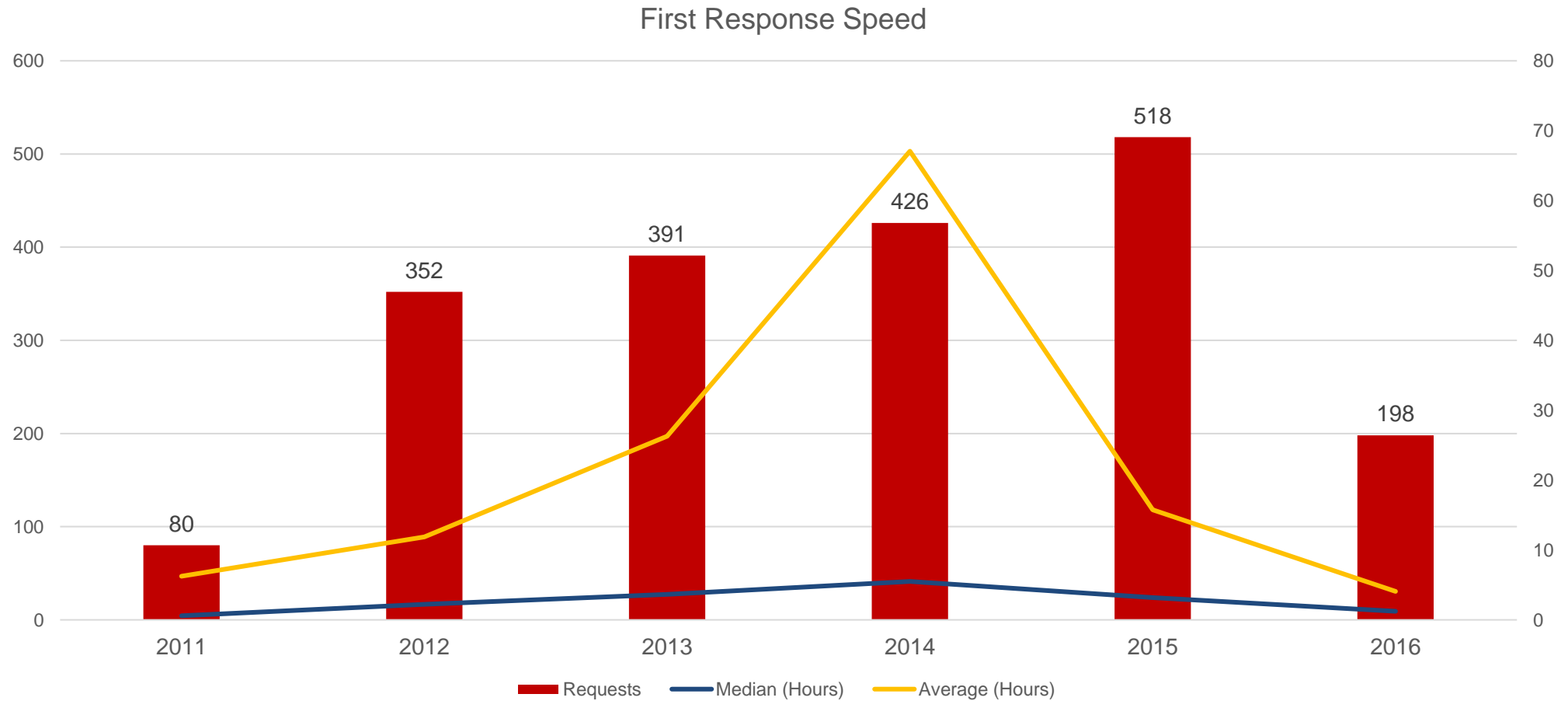
Year in Review

- The Nest Re-design
- Listservs
  - Directors listserv
  - Reports listserv
- Newsletter "Birds Eye View"
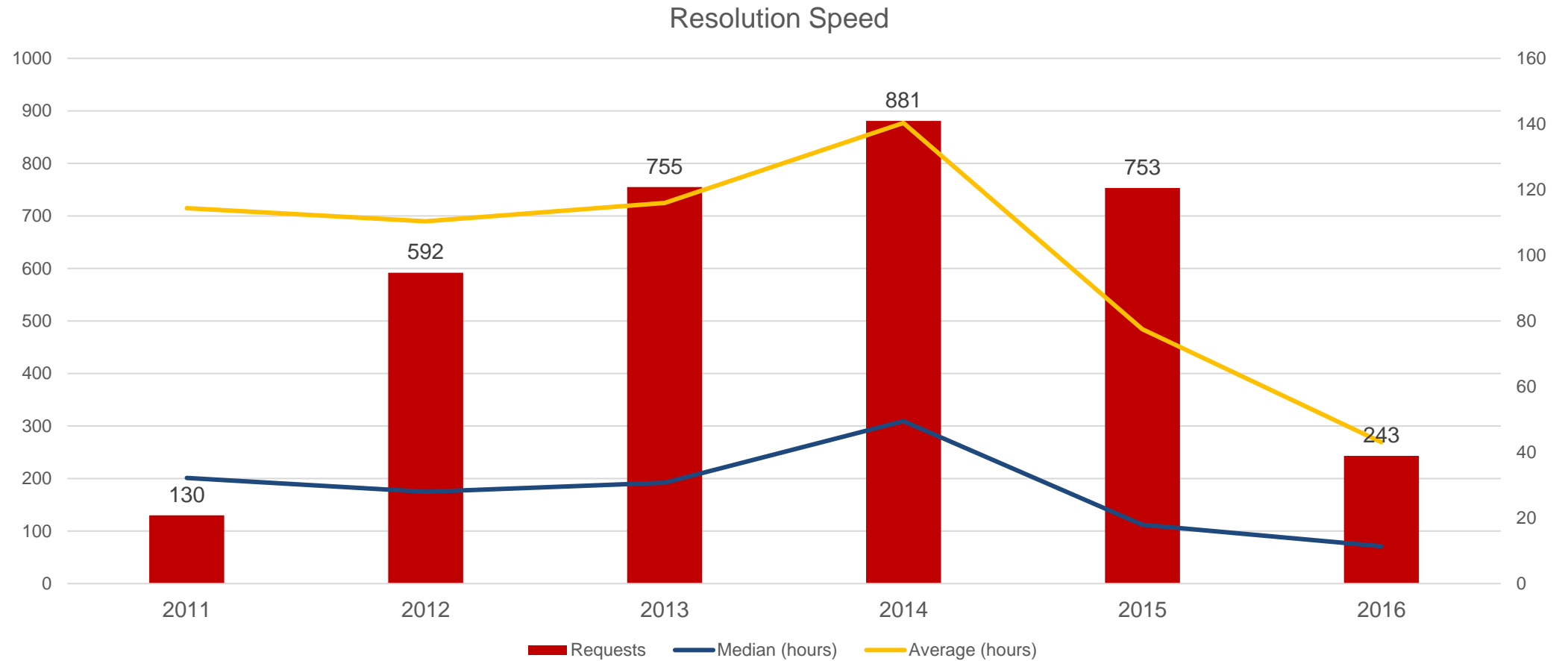- Annual Survey

Help Desk Data

- Using HelpSpot since July 12, 2011
- 3,399 tickets submitted
- Goals
  - Response time
  - Resolution time

Help Desk Data

First Response Speed

Requests — Median (Hours) — Average (Hours)

Help Desk Data

Resolution Speed

Hosted Proxy (EZProxy by NC LIVE)

- Remote access
- Restricted access
- Standardized login
- Single authentication

Sample EZProxy Login

Hosted Proxy (EZProxy by NC LIVE)

- Iredell County is currently using the service

- 8 libraries are being migrated over now, 2 additional libraries have signed up

- New cohort of libraries will start in July (sign up with Catherine or Erin)

Consolidation Project: Phase One

<u>Schedule</u>

- June 6
  - o Shelving Location Mapping-IN PROCESS
- July 11
  - o Farmville Circulation Modifier and Policies Mapping
- July-September
  - o Testing

Consolidation Project: Phase One

- Farmville Pilot
- Circulation Modifiers
  and Shelving Locations list

FY 2016-2017

Upcoming Activities
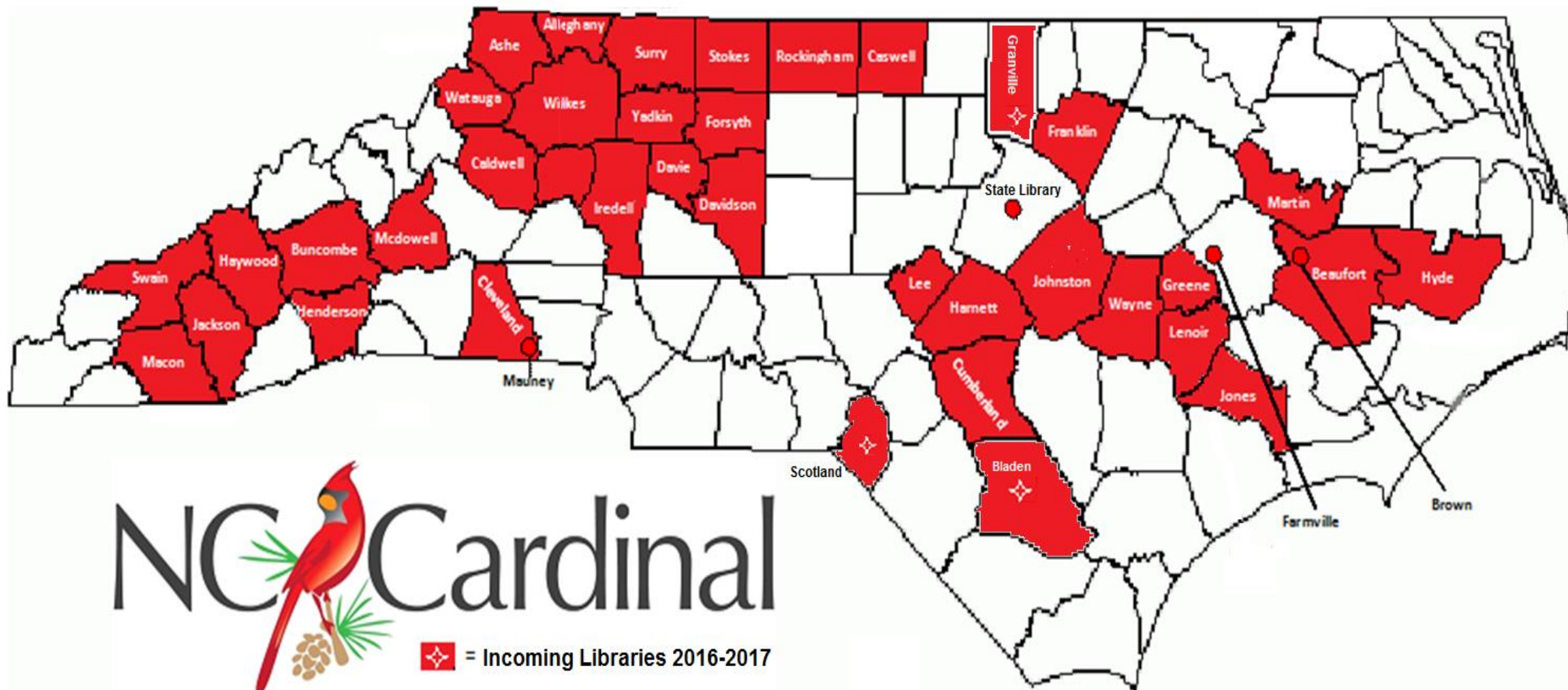
FY 2016-2017

1. State Library
   - Government and Heritage Library
   - Governor's Mansion Collection
   - NC Museum of Art Library
   - Dept. of Labor
   - Dept. Transportation
   - North Carolina Legislative Library
   - H.H. Brimley Memorial Library, North Carolina Museum of Natural Sciences
   - Environmental Literacy Center

2. Scotland
3. Bladen
4. Granville

= Incoming Libraries 2016-2017

Fines and Fees Policy

- Collection Fees
  - o Patrons in collections
  - o Fees collected by <u>*Assessing*</u> Library

- Lost & Damaged Items
  - o Pay at any branch
  - o Courtesy email/contact

- DVDs
  - o Void or forgive fines/fees (incl. rental fees) based on local circulation

Strategic Plan

- Comprehensive Review
  - o Organizational Structure
  - o Staffing
  - o Resource Sharing mechanism
  - o Financial Sustainability

- Request for Proposal

Strategic Plan

- Kickoff meeting: June 20-21, 2016
  o Governance Board
  o SLNC
  o Cataloging Committee
  o Resource Sharing Committee

- August 24-25 Meeting
  o Develop Strategic Plan

FY 2016-2017

- Consolidation Project – Phase 2
- Cataloger training and assessment
- Assign all staff individual user accounts
- AV catalog deduplication
- Student ID Project – Iredell
- OPAC/KPAC Customization

Work Group Discussions

- Consolidation of Patron Types

- OPAC Customization

- KPAC Customization

Work Group Discussion

- Discuss by table
- LD Consultants act as note takers
- Summary of table discussions

Thank you for your time!