

NC Cardinal Annual Meeting Discussion Notes

August 17, 2023

Benjamin kicked off the session with a presentation reviewing some of the changes that have happened since the last Strategic Plan completed in 2016. Following that review, we offered four topics for reflection and discussion:

- **Communication:** How do we communicate within the organization, make sure everyone knows what they need to know, respect people's attention, and give members a voice?
- **Policy making:** How do we decide policies and best practices that affect all member libraries?
- **Staff support:** How do we support the staff members that use Evergreen every day?
- **Public service:** How do we better serve members of the public that use our services like the OPAC, resource sharing, etc.?

Attendees split into four groups and moved among stations in the room, discussing the Strengths and Opportunities for Cardinal relevant to the topics. Once everyone had a chance to comment on each topic, everyone voted on the most popular Opportunities. The Cardinal team met after the meeting, discussed the Opportunities and rankings, and put together an Action Plan to address the feedback. (Some Action Items needed further investigation and were included in the Tentative section.)

Communication: How do we communicate within the organization, make sure everyone knows what they need to know, respect people's attention, and give members a voice?

Strengths	Opportunities
<ul style="list-style-type: none"> ● Basecamp (subject categories) (+++) ● Cardinal response time (+++) ● Help Tickets (+++) ● Access to communication methods available to all library staff (+) ● Accessibility to communicate Cardinal Team (+++) ● Annual Survey Response knowledge book page ● Voice of library staff are able to be captured using listserv ● Cardinal Contact List (+) ● Access to training resources and knowledge book pages (+) ● Detail explanations provided in help ticket/email responses (+) ● Personal attention to each system from Cardinal Team (+) ● Cardinal's Team Effort approach when communicating in tickets and emails(bring in team member as needed) ● In person meetings (Annual Meeting) 	<ul style="list-style-type: none"> ● More library to library communication ● Easier access/usage of Cardinal Contact List (possible active links) ● Communication with staff alerting to EG issues (outside of Basecamp) - possible via direct email to system's point of contact ● Further communications regarding scheduled upgrades and required offline usage windows [7] ● More structured communication between migrating and mentor systems (after migration process has been completed) ● Prepare and provide meeting agenda prior to meeting [4] ● Access to committee meeting notes setup similar to Annual Survey Response KB page (Cataloging Committee/Experience Committee) [4] (++) ● Weekly/Monthly Summary Email (recap consortium activity to provide library staff) [5] ● Tutorials/training for Basecamp [2] ● Filter delivery of Basecamp notifications [2b] (+) ● Basecamp etiquette (Cardinal steps in to de escalate potential inappropriate behavior/communication) [2a] (+)

Policy making: How do we decide policies and best practices that affect all member libraries?

Strengths	Opportunities
<ol style="list-style-type: none"> 1. The various committees and the discussions they hold and facilitate within the larger NC Cardinal community (+++) 2. The governance committee in particular and its ability to speak for and represent the consortium at large (++) 3. Surveys, especially the annual survey, that allow for more direct input from the consortium members (+) 4. The diversity of the member libraries (municipal, county, regional, local, etc.) 5. The representation afforded by having such a diverse membership 6. Member libraries being given the opportunity to vote on matters such as the governance committee membership 7. Member libraries being asked for input on proposed policies/procedures (kind of goes along with voting and surveys) 8. Allowing members a modicum of freedom to determine their own local policies and procedures for things like circulation, holds, etc. 9. The outcomes of policy processes have been found to be largely positive 	<ol style="list-style-type: none"> 1. Determining a way or devising a strategy to help enforce the policies that are in place (+++++) 2. Distilling the most commonly asked about policies into a smaller, more easily digestible document than the Knowledge Books [3a] (+) 3. Clarifying fines policies and procedures specifically as they relate to resource sharing, damaged or lost materials, etc. [3c] (+) 4. Offer a primer for new libraries on what the committees are and what they actually do, how/why decisions are made, how new policies and procedures are implemented, etc. [3a] (+) 5. Create a policy for material quality when resource sharing (i.e. when is an item too damaged to ship in resource sharing and when should it be weeded instead?) [3c] 6. Clearer delineation between the differing levels of policies, guidelines, best practices, recommendations, etc. [3] 7. Timely rolling out of training opportunities, videos, documents, etc., when there are policy and/or best practices changes (esp. re: cataloging) [3a] 8. Have the committees share their agendas for meeting with everyone beforehand and then share minutes/notes with everyone after [4]

	<p>9. Monthly Cardinal digest/newsletter that summarizes important updates, notices, etc. [5]</p> <p>10. Create Niche Academy assessments on NC Cardinal policies similar to cataloging assessments [3a]</p>
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Staff support: How do we support the staff members that use Evergreen every day?	
Strengths	Opportunities
<ul style="list-style-type: none"> ● Knowledge Book Content (+++++) ● Ticket response (+++++) ● Basecamp/email response (+) ● Training Improvements (++++) ● Basecamp community ● web client angularization (++) ● Simple reporter (+) ● Continuous improvement (+++) <ul style="list-style-type: none"> ○ Evergreen updates, basecamp updates etc. 	<ul style="list-style-type: none"> ● Improve KB subjects and organization [10] (+++) ● Improve KB search (+++++) ● Search Template Default ● In person training (++) ● System lag/issues ● Entry level trainings (+++++)<ul style="list-style-type: none"> ○ Smaller trainings for smaller tasks and part-time employees [9] ● Catalog Search (+) ● In person Mentor [11] (++)<ul style="list-style-type: none"> ○ Staff member from mentor library guides migrating library staff in person ● Report descriptions [1] (+++++)<ul style="list-style-type: none"> ○ People seemed to be unaware of the shared reporter templates KB page ○ Review descriptions to make sure they're accurate what information they're retrieving ● More help with reporter [1] (+++++)

	<ul style="list-style-type: none"> • Help/training with Basecamp (too many conversations) [2] (+++++) • Transit issues [6] (++++)<ul style="list-style-type: none"> ○ Hard to tell where items are going • Universal Library Expectations (+++++)<ul style="list-style-type: none"> ○ All of the daily, weekly, and monthly tasks that a library system is expected perform as a member of NC Cardinal [3a]
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Public service: How do we better serve members of the public that use our services like the OPAC, resource sharing, etc.?

Strengths	Opportunities
<ul style="list-style-type: none"> • Integration with 3rd party vendors • Access to materials (++++) • Student Access Project (++) • Extremely popular with patrons (+) • Offers so much across the state • Ability to change the colors of the OPAC will be exciting • Highly visible • Lists and baskets feature is popular and useful • Patrons like the fact that they can use their cards at different libraries across the state (+++++)<ul style="list-style-type: none"> ○ Convenient ○ Flexible 	<ul style="list-style-type: none"> • Bucket/lists features can be hard to use, patrons would benefit from embedded tutorials [9] (++) • Circ history options are confusing to patrons (+)<ul style="list-style-type: none"> ○ Would be nice if patrons could opt-in to having circ history visible to staff ○ Opt-in to history in patron view is hard to find • It's hard to find lists once a patron has created them [9] • Searching in OPAC is hard to use (++++)<ul style="list-style-type: none"> ○ Smart search of autocomplete would make patron search experience easier ○ There is no effective filtering system in results ○ Author search is unreliable

- Especially popular for patrons of municipal libraries within a county that uses NC Cardinal, as well as patrons on county lines who may be equally close to two different systems
- Patrons no longer need to pay out of county fees to check out materials from other libraries
- Carousel (+)
- Resource sharing has allowed libraries to stretch budgets, giving more money for other services and materials (++)
- For some libraries, Evergreen is a vast improvement over previous OPAC
- Patrons appreciate being able to return materials to other Cardinal libraries (useful for vacations, etc.) (+)
- Patron control over account information (ability to change their own address, phone number, etc.) (+)
- Helps with collection development (resource sharing requests help libraries target purchases to what their patrons are requesting)
- Consistent patron experience throughout the state
- Helps to smooth rifts between municipal and county libraries
- API Integration

- It's not intuitive how to search all of NC Cardinal
- Are resource sharing costs sustainable over time?
- Resource sharing can be very slow (++)
- Patrons would like an app
- Not very user-friendly, clunky
- Age-hold protection messaging is confusing
- E-books in search results are confusing [8] (++++)
- Overdrive doesn't keep up with the catalog, so when a book is deactivated in Overdrive it sometimes still shows as active in the catalog
- If ebooks are going to show up in the catalog search results, availability information should be included
- Maybe ebooks should show up in the staff side but not in the OPAC
- Could libraries opt-in to including e-books in search results?
- More personalized shelving locations
- Fewer shelving locations
- Circ limits are confusing when using cards at different libraries (++)
- It would be helpful to have a list in the Knowledge Books of the circ limits for all libraries
- Keep making improvements to accessibility
- PIN and phone number match ups can be confusing (+)
- Default hint for forgotten PIN is last 4 digits phone, even for libraries that use a different default PIN
- The PIN is not automatically linked to phone number for libraries that use phone number as default, so a phone number update does not update PIN, and PIN

	<p>typos are possible even when phone number is correct</p> <ul style="list-style-type: none">• No standard criteria for item condition for resource sharing [3c] (+)• Lack of transparency on status of items while in-transit [6]• Patrons don't know about the multi-card policy or the ability to return books to other libraries [3b]• Multi-card policy can be confusing and is inconsistently applied across the state [3b] (+)<ul style="list-style-type: none">○ Other libraries will sometimes deactivate a card for another system
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Group Ranking of Opportunities

- **Opportunity (count of votes)**

- More help with Reporter (26)
- Clarifying fines, damaged items, etc. as they relate to resource sharing (21)
- Smart search / effective filtering (16)
- Universal library expectations (15)
- Resource sharing timeliness / transparency (12)
- Embed tutorials into OPAC (9)
- Library to Library communication (9)
- Basecamp training (7)
- Short, easily digestible document of most commonly asked about policies (7)
- Knowledge Book search (6)
- Filter delivery of Basecamp notifications (6)
- Ebooks in search last (5)
- Enforcing Policies (5)
- Basecamp etiquette (5)
- Multi-card consistency (4)
- Communication of policies to everyone (4)
- In-person training mentorship (2)
- Meeting notes (1)
- Basecamp Organization / Training (0)
- Primer on committees, governance, how decisions are made, etc. (0)

Subject [Action Item Number]

Services to staff [1]
 Policy making [3]
 Services to Public [12]
 Services to staff [3]
 Services to Public [6]
 Services to Public [9]
 Communication
 Communication [2]
 Policy making [3]
 Services to staff [10]
 Communication [2]
 Services to Public [8]
 Policy making
 Communication [2]
 Services to Public [3]
 Policy making [3]
 Services to staff [11]
 Communication [4]
 Services to staff [2]
 Policy making [3]

Action Items

1. Offer better support and training for the Reporter
2. Basecamp trainings and pinned post
 - a. Basecamp etiquette, refer to Cardinal team if necessary
 - b. Strategies for filtering messages
3. Improve clarity and communication of policies
 - a. One page, Articulate module or simple KB page of basic policies and practices everyone should be aware of. Clearly notify staff when policies are updated. Follow up with assessments?
 - b. Clarify and update Multi-card policy as needed
 - c. Clarify and update resource sharing policies, specifically in the area of damaged materials, packing practices
4. Share Committee Agendas before and Meeting Minutes after meetings
5. Newsletter / blog / monthly FYI Basecamp post to better share information
6. Find ways to improve clarity on the status of items in transit
7. Better documentation, training and tutorials for upgrades

Tentative Action Items (Under Investigation)

8. Clean up management of ebooks. More proactive weeding. Overdrive API development
9. Investigate smaller embedded tutorials in OPAC: search, buckets, lists
10. Way finding assessment for KBs? Improve search.
11. Improved support of migrating libraries: In-person mentor, structured connections after migrations
12. See what is possible with search suggestions / did you mean