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

<table>
<thead>
<tr>
<th></th>
<th>GA PINES</th>
<th>NC Cardinal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items</td>
<td>10.6 million</td>
<td>5.8 million</td>
</tr>
<tr>
<td>Patrons</td>
<td>2.4 million</td>
<td>1.8 million</td>
</tr>
<tr>
<td>Branches</td>
<td>285</td>
<td>116</td>
</tr>
<tr>
<td>Transits</td>
<td>632,540</td>
<td>1.6 million</td>
</tr>
</tbody>
</table>
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 2016 – 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

<table>
<thead>
<tr>
<th></th>
<th>Total Transits</th>
<th>Average Transits</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>1,087,165</td>
<td>90,597</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>1,550,343</td>
<td>129,195</td>
<td>29.9%</td>
</tr>
<tr>
<td>2015</td>
<td>1,631,119</td>
<td>144,124</td>
<td>5%</td>
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### Transit Data – 3 Year Totals

<table>
<thead>
<tr>
<th></th>
<th>Total <em>Intra</em>-Transits</th>
<th>Total <em>Inter</em>-Transits</th>
<th>% Increase <em>Inter</em> - transits</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>921,760 (84.8%)</td>
<td>165,405 (15.2%)</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>1.23 Million (84%)</td>
<td>239,994 (16%)</td>
<td>31.08%</td>
</tr>
<tr>
<td>2015</td>
<td>1.12 Million (68.6%)</td>
<td>511,913 (31.4%)</td>
<td>53.12%</td>
</tr>
</tbody>
</table>
Transits – 2013 to May 2016
<table>
<thead>
<tr>
<th>Year</th>
<th>Total Costs</th>
<th>Average Monthly Costs</th>
<th>% Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>$117,450</td>
<td>$9,787</td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>$161,252</td>
<td>$13,437</td>
<td>27%</td>
</tr>
<tr>
<td>2015</td>
<td>$215,396</td>
<td>$19,581</td>
<td>25%</td>
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</table>
Resource Sharing Costs
Year in Review

Support and Maintenance
Year in Review

• The Nest Re-design
• Listservs
  o Directors listserv
  o 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)**

<table>
<thead>
<tr>
<th>Year</th>
<th>Requests</th>
<th>Median (Hours)</th>
<th>Average (Hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>352</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>391</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2014</td>
<td>426</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>518</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>198</td>
<td></td>
<td></td>
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</table>
Hosted Proxy (EZProxy by NC LIVE)

- Remote access
- Restricted access
- Standardized login
- Single authentication
Sample EZProxy Login

Log in to access this resource
Please login with your Iredell County Library card and PIN.

Use your library card number:

Library barcode number:

PIN:

Need help?

Need library location and hours?
Library location and hours

Have a question about using the library?
Using the library
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

Schedule

• 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
Fines and Fees Policy

• Collection Fees
  o Patrons in collections
  o Fees collected by Assessing 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!