

Library Directors' Advisory Group
2 May 2014
Meeting Minutes

Location: Creston Public Library, Creston BC.

9:30 AM – 3:30 PM

Attending: Jim Bertoia, Sparwood; Avi Silberstein, Grand Forks; Marianne Hansen, Salmo; Heather Maisel, Castlegar; Eva Kelemen, Kaslo; Aaron Francis, Creston; June Stockdale, Nelson; Nicole Pawlak, Invermere; Ursula Brigl, Cranbrook; Marie Onyett, Beaver Valley; Diane Andrews, Elkford; Joanne Richards, Kootenay Library Federation.

Minutes – Sabina Iseli-Otto

Call to order – 9:45 AM (PDT)

1. Introductions

2. Election of LDAG Chair & Vice-chair

Heather Maisel – Chair

Aaron Francis – Vice-Chair

3. Regular Business Meeting

Additions to/Approval of Agenda (Jim, Marie; carried)

b. Approval of Minutes – October 2013 Meeting

- Minutes to be amended to include Jim Bertoia (Sparwood) as attendee. (Motion to approve amended minutes - Diane, Avi; carried)

- Business arising from minutes (None.)

4. LibPress with Marie Palmer via internet

- A number of libraries currently in the works; Rossland, Radium, Nelson, Fernie, Kimberley, Nakusp, Elkford, and Cranbrook are in the queue.
- Development process: kick-off phone call followed up by an email and paperwork. Three 1-hr training sessions take place while website design is in progress. Final steps are content migration (collaboration between co-op and library staff), and then website launch.
- To prepare for your website: think about if there are things you want to leave off your old website, or add into your new one. Do you want to use your existing logo or no logo at all (co-op can't create a new logo for the library)? What colours do you want to use? There are 2 columns on either side of the content – how would you like them to look? Look at some examples: they can be patterned (e.g. Grand Forks, Houston), colored (Fort Nelson, Lillooet), or white (South Central). Do you have a preferred font style?
- If anyone has questions, please contact Marie: mpalmer@bclibrary.ca or 1-855-383-5761 x 1018.

Quick Coffee Break and viewing of Creston's Self-Check Machine

Don't need to use a 3M machine or special equipment. The system is comprised of a a touch screen monitor with a mini hard drive, barcode scanner, receipt printer and software supported by Sitka.

5. Sitka & Co-op cataloguing and purchasing update – with Laurie Davidson

Sitka currently works with 74 libraries; 13 of which have branches (120 total service points across all the libraries), comprised of 57 BC libraries and 17 in Manitoba. Most libraries are public, but also several school, special, academic, government libraries. Consistently adding 10 libraries per year – constantly growing catalogue and bibliographic records are always flowing in.

Every library does its own cataloguing and each library has its own cataloguing practices. Challenges as a result: growing database, plethora of brief records (via acquisitions module), RDA, and duplication.

Most other consortia have centralized cataloguing and many library members don't have the ability to do any cataloguing. Not necessarily what we want to do, but we do have some features that make us different from other libraries.

Statistics:

- 1.7 million bib records; ~300,000 are e-resources (on par with VPL and FVRL)
- 195,000 item records added in 2013 (excluding migration)
- 140,000 bib records added in 2013 (excluding migration)

Biggest problem: duplication. 5-10% of new records are duplicates. Goal going forward is to figure out how to reduce duplication. Effects:

- Hinders staff efficiency (e.g. which of 6 records is the best one to which to add a new holding);
- Difficulty for patrons searching for materials and not sure which records to use.

Considerations for bibliographic control:

- Mindful of resources (both money and staff time);
- Simplify work;
- Provide better library support and service to member libraries;
- Honour local autonomy and decision-making.

De-duplication of database took place in 2012; was somewhat successful but some parts didn't work as well as it should have (e.g. merged records). Another automatic de-duplication project is in the works (likely for summer and fall 2014).

January 2013 – 59% response rate on member survey:

- Average Sitka library has 40,000 items in catalogue; adds 1000 bib records and 4000 items. 60% added with no modification to bib record; 15% added modification to bib record; 20% is bringing a new record into the system (record doesn't exist; unsure if same item; etc.); 5% is original cataloguing.
- What processes can we adopt to increase number of additions requiring no modifications to bib records?
- Biggest challenges: finding good records (especially for non-standard book records); staff time and resources for cataloguing (88% said they wanted to reduce staff time on cataloguing); poorly-catalogued records in Sitka (discomfort about editing someone else's bib record means libraries bring in new ones which create duplicate records); more cataloguing training needed.

Things Sitka's approach to address these challenges:

- Sitka-wide contract with materials purchasing vendors;
- Automatic de-duplication;

- Explore more centralized cataloguing support;
- Software improvements to Evergreen;
- Ongoing authority work;
- Investigate Sitka-wide bibliographic utility to help find harder-to-find records.

Idea of testing with a materials purchasing vendor: coordinate ordering with specific vendor(s) to work with Sitka HQ to make materials, perhaps, shelf-ready. Explore cost-effectiveness and other implications. In 2013, Sitka issued Request for Information asking vendors to propose purchasing discounts, cost of MARC records, cost of processing and shelf-ready services, and automatic release plans (e.g. based on library's requests, vendor makes selections). Five vendors responded (ULS, Library Bound, B&T, Library Services Centre, and Whitehots) and all met basic requirements sent out in RFI.

Feb 2014 survey to libraries explored current relationships with vendors and services being used. 30 of 74 libraries responded:

- Estimate \$3 million physical material purchasing budget across Sitka (\$1,257 million for respondents); average library is \$42,000/year. 70% spending on books, 14% DVD, 5% Large Print, 5% audiobook. Current discounts are 5-41%; average is 30-35% -- similar to overall vendor purchasing discounts provided in the RFI.
- Cataloguing costs: 5-10 minutes of cataloguer's time per record though faster if just adding copies; some (e.g. multilingual, DVDs, graphic novels) take ~15 mins each. Libraries pay \$0.56 - \$1.92 if purchasing records (many no longer purchase since joining Sitka).
- Processing Costs: \$1.75 - \$6.50 per item – higher DVD and audiobooks. Average processing time is 5 mins. Donations may account for 10-50% of the collection. Combination of volunteers and staff so total cost is variable and difficult to calculate.
- Shelf-Ready (e.g. book arrives, you scan it in, and it's ready to go on the shelf) Costs: where we may be able to realize the most cost-savings. From RFI, total shelf-ready costs (MARC record, item info, and processing) could range from \$2.50-3.00 for non-AV material, and up to \$5.00 per item for AV material. Compare this to current cataloguing and processing per item reported by libraries is in the \$6-7 range.
- Turn-around Time from Order to Shelf: average time from order to point of arrival at library is 17 days, then 7 days for processing in the library.

Currently embarking on Pilot Project with several libraries:

- Looking for 8-10 public libraries to test shelf-ready process with at least 2 vendors. Maybe also test an Automatic Release Plan (e.g. travel guides, childrens' series – areas for which there is very little selection decision making happening), if possible.
- Kimberly, Creston, Castlegar, Gibsons, Tumbler Ridge, Fort St. James, Saltspring, and Terrace. Okay to have more.

Advantages for Libraries

- On-order records in system right after order allowing patrons to place holds;
- No or reduced staff time for creating on-order records;
- Full MARC records and item level information coordinated centrally; no or reduced staff time required to find MARC records and add holdings;
- No or reduced staff time spent on processing materials;
- Faster order-to-shelf timeline;
- Reduced duplication of MARC records;

- Automatic Release Plans (ARPs) – no staff time on rote ordering of the most common/popular items;
- Overall better materials purchasing and processing discounts.

Suggested Workflow for Pilot Libraries:

- Libraries order materials from vendor's website by a set time every week;
- Weekly, Sitka staff get a consolidated on-order file that is loaded centrally – patrons and staff can see on-order items and place holds; vendor ships processed materials to library (can include barcode, spin label, property stamping, mylar covers, security or RFID and more);
- Vendor sends consolidated file to Sitka staff for centralized downloading of MARC and item records;
- Library receives box of materials. Staff scan in barcode, bring up the item record, check the completeness of the item attributes and make the book available for circulation.

Looking for significance in:

- Purchasing discount
- Cost of shelf-ready
- Time from order to available (something significantly better than 24 days)
- Shipping costs (libraries already don't pay much)
- Does this help reduce duplication of records in the database?
- What's the quality of the MARC records, accuracy of item information, quality of processing services, willingness of the vendor to work with us, timeliness, flexibility, and cost?

Timelines Moving Forward:

- Coming week: first meeting with pilot libraries to identify pilot vendors;
- Summer 2014 – set up pilot with vendors; start fall or winter 2014;
- Investigate ways of moving forward with other cataloguing recommendations (eg. Automatic de-duplication, continuing Evergreen software improvements, a cataloguing clearinghouse, etc.)

Questions:

- All libraries buy the latest John Grisham – is there a way each library doesn't have to pay for a MARC record? LD – Yes! Goal is to pay for MARC records only once.

Questions? Laurie Davidson: ldavidson@sitka.bclibraries.ca

Joanne spoke with the CBT about the possibility of some funding to second Kootenay cataloguers to create a shared Kootenay Cataloguer position. KLF libraries would have to agree not to make adjustments to the records, and would need to have clearance across the province. Comments:

- Would still have problems with the existing duplicates in the database; there maybe time in the secondment to work on this.
- Might set a good example of what works for other libraries; getting over the fear-factor of losing autonomy. "With the staff time we've freed up, we've been able to do this, this, and this instead..."
- This model of consortial shelf-ready purchasing seems inevitable but we're taking a part of our budget and giving it to a private company to do this work. Either we're reducing the number of materials we're getting for our money, or taking it from our staff. What's the sense in the room of this issue?
 - Unsure about small libraries and shelf ready material;

- Nelson does exactly what's been described: has freed up time for community-development work. Didn't displace jobs. Important from strategic planning process to make staff available.

For the libraries producing lots of duplicates: are those libraries aware that they're doing it? There doesn't seem to be a lot of feedback for libraries from Sitka.

- It would be nice to have something in the software that prevents duplication.
- The real place to raise these issues is at the Sitka BFG meetings.
- We all want to do our work better.

KLF Library Directors agree to let each other know if there are problems with another library cataloguer's work, and to ask their cataloguers to let them know if they see problems. Communication between libraries will take place between library directors.

Is there interest in approaching CBT for a cataloguer? Advice: wait for pilot project to be done.

6. Interlibrary Connect

What about resource-sharing grants?

- In grant letters, we're asked to do more and better resource-sharing through OneCard and direct patron requests. Province has set out those objectives, so it puts an onus on them to fund that activity.

Do we need stickers?

- Joanne to purchase rolls of the definitely removable stickers as soon as she is able and she shall divide them among the libraries;
- It is recommended that all libraries use these stickers upon their Kootenay Connect books;
- And libraries can use the last of their old stickers before using the new stickers;
- And the colour of the stickers - green,
- **Name of the service, shall be "Kootenay Connect": Moved by June Stockdale, seconded by Aaron Frances. Carried.**

Does the 12-month restriction on newly-acquired items make sense?

- Decided to maintain this restriction; 12 months is from the accession date (not publication date). Review in at the next LDAG meeting.

Who collects overdue fines?

- **Motion - Fines are collected and cleared at the patron's home library, for both OneCard and Kootenay Connect. Moved – Marianne Hansen, Second – Marie Onyett; carried.**

Can patrons from Creston return their Kootenay Connect books in Salmo? Yes!

- It is possible for library staff to check an item's status (e.g. if it's been returned elsewhere) online via Sitka. Date-stamping KC books that are received in case they are returned elsewhere may be helpful.

What about the holds policy?

- Maintain that it's a local decision.

7. Spending priorities for retained earnings

Agreed after teleconferences and surveys to spend about half of the \$25,000 on Skillssoft training, Strategic planning and Creston migration to Sitka.

8. Strategic planning process – discussion, thoughts?

Strategic plan will set spending priorities.

About \$5,000 set aside for a consultant; may be able to get support from CBT. We want consultant to help with survey design and facilitation;

Agree rolling strategic plan (annual review to set priorities) may be best.

Please let Joanne know if you have any suggestions for consultants.

9. Toolshed Discussion: librarytoolshed.ca

The Toolshed is a partnership between the BC Libraries Co-op and The Alberta Library under direction from ABCPLD. If you are developing training materials for your library, upload them – Toolshed is only as good as the content that's contributed.

To sign up, go to the website, sign up for an account, and upload your material.

There is also a good rating system – can see and apply ratings for content.

Helpful if we need things like strategic planning documents to ask each other to upload their materials to the Toolshed instead of emailing documents around.

10. Non-bullying policy discussion

As of November 2013, under the Workers Compensation Act, all employers must have Anti-bullying policy and procedures in place. New Westminster PL shared their policies on the Commons.

WorkSafe BC templates are very generic and can be easily adapted to meet all requirements. Please see - <http://www2.worksafebc.com/Topics/BullyingAndHarassment/Resources.asp?reportID=37260>

11. B4B Project

Joanne and Kathy Anderson work together to coordinate Books for Babies for the whole province. The Federations took this over from BCLA when Jim Looney retired. We typically purchase 4000 units of kit materials (bags, books and CDs). This is about 10% of the annual provincial birth rate. Is this an important program for your library?

Comments: Maybe a disconnect in the program. Many parents don't realize the materials are from the library and it's such a busy time to be a parent. So many things are lost in those first months.

Advice – survey libraries across the province to gather information on interest in the program.

12. OBOK

This is the last year for OBOK in its current format. It is a lot of work and time for a small group of people. We may be able to revamp for a new approach or offer every few years.

The KLF might like to consider another cross region public program. Ursula has presented the idea of a Reading Challenge. This may be a good fit for the KLF. Again, this may be something to consider for the strategic planning process.

13. Small group staff training

Proposal: five 1-day regional gatherings in the fall for staff training (file management, document management in one part of the day; rest of the day doing e-devices support). Estimate the cost would be about \$8,000 plus libraries' staff time and travel costs.

Nelson used the Web Junction list of core competencies and asked staff to self identify their skill levels and plan to train for areas that need improvement.

http://webjunction.org/documents/webjunction/Competency_Index_for_the_Library_Field.html ;

Creston did a similar assessment and then partnered people up to learn together. (Both Aaron and June shared procedural info on the list following the meeting.)

Advice re small group staff training: wait until strategic plan is in place to decide what the direction should be.

14. Skillsoft update and demo – Q & A

15. Overdue Procedure – Grand Forks Library

Grand Forks and District PL adopted a no overdue fines policy starting in January 2014. Results so far:

Compared to last year, there's a slight increase in overdues as a percentage of circulation; but looking over past 5 years, it's neither the highest nor the lowest. Interested now as overdue borrowers as a percentage of total borrowers – similar story. Now looking at different thresholds: 7 day, 14 day, etc.

16. Zinio pricing and libraries not participating in the provincial deal – Trail, Beaver Valley, Grand Forks, Creston, Invermere, Radium, Nakusp

What is the opinion on Zinio? People who use it, love it. Takes some getting used to because there's the library's collection and their own account. Anyone have it but want to ditch it? No. One of the issues is that because it's a commercial product, it's really fast at bouncing people out of the existing subscription's content. Public library overlay is a little bit "thin". The service itself is pretty slick. There's no guarantee on what the content is going to be – at the behest of publishers (e.g. Chatelaine and Macleans are no longer available).

18. Adjourn – 3:30 pm