

## **SHARE Members' Group Meeting**

Thursday, January 12, 2023, at 2:00 p.m.

Illinois Heartland Library System

via [Zoom](#)

### **Minutes**

**Welcome/Call Meeting to Order:** Called to order by Sarah Hill at 2:00 p.m. She welcomed SHARE members to the meeting.

#### **SHARE Report**

*Cassandra Thompson, SHARE Director*

New staff members were introduced to the membership. SHARE has 338 member library agencies at 467 locations; 2% are academic libraries, 3% are special libraries, 33% are school libraries, and 62% are public libraries. Of those public libraries, 80% serve a population under 10,000. The SHARE catalog has around 8.8 million shared items, and in FY2022, 775,000 patrons were served, with 6.7 million items circulated. Freeburg Community High School has joined SHARE as a transitional member, and Ben-Gil Elementary is now a full SHARE member. In April of 2022, SHARE celebrated its 10th anniversary. The SHARE Mobile Library App was implemented over the last year. The McNaughton Book Leasing Program was launched and will be available again in July for those interested. The Kit and Kaboodle program was updated for ease of use for patrons. Readers' Advisory content is available on the SHARE Highlights page. A new text alert service is available to member libraries to notify them of Polaris service outages. Aspen Discovery from ByWater Solutions was selected as the best and most cost-effective solution to the pain points found with the current discovery layer, PowerPAC.

*Dena Porter, SHARE Administrative Services Manager*

Polaris 7.3 is now live, with most updates geared toward cataloging, serials, and Leap integration. Member libraries should have received their Year-to-Date Savings Report for 2022. For any libraries considering going fine-free, a handout is available to help with the transition, and reports can be sent to help with waiving fines. Many SHARE libraries are now part of the Common Loan Group, and additional information is available on the SHARE website. Circulation training is available in-person or in a virtual setting as needed. After-hours support is available for immediate issues with Polaris outside of IHLS business hours or on weekends.

*Jennifer Baugh, SHARE Bibliographic Services Manager*

In 2022, SHARE Bibliographic Services cataloged over 6,400 items, imported over 4,200 \$3 Bib. Requests, and cleaned over 93,000 bibliographic records. In-person and virtual trainings were offered for

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barcoders and catalogers, as well as asynchronous courses. Classes and meetings included catalogers training sessions, Barcoding 1 and 2, a Dewey Decimal classification course, and one-on-one instruction sessions with those in training. Fifteen libraries sought cataloging certification for one or more staff members, and 319 files were reviewed during this process, as well as over 1,000 records imported. The SHARE Your Cataloging Questions program was launched to allow barcoders and catalogers to ask SHARE staff questions or discuss concerns. Three staff members retired, and two new members joined the team. Barcoder Refresher Training was introduced due to increasing violations of SHARE bibliographic and cataloging policies and procedures. Implementation is pending member vote.

*Danielle Beasley, SHARE Resource Sharing Specialist*

cloudLibrary is popular and gains 440+ new users per month on average, with around 17,000 unique users in the last 12 months. 36% of users have more than 12 circulations per year, with 21 being the overall average. There has been a 5% increase in pay-per-use (PPU) spending in FY2023 so far. The monthly budget for PPU titles is consistently being met in advance of the month's end. For member libraries using cloudLibrary, additional funds can be given for collection development, which will increase the titles available for all participants. A new SHARE working group is being created to assist with patron engagement for member libraries to help share and crowdsource readers' advisory content and other patron-facing materials.

### **Cataloging Maintenance Center (CMC) Report**

*Dr. Pam Thomas, CMC Bibliographic Grant Manager*

During 2022, the CMC originally cataloged 757 items, enhanced 287 item records, and reviewed 482 bibliographic records. Three staff members completed Name Authority Cooperative (NACO) training. Eighty-one authority records were created, six existing authority records were enhanced, and 510 records were merged in OCLC Connexion. Two database cleanup projects are in progress. For the Alma/Consortium of Academic and Research Libraries (CARLI) project, 7,707 bibliographic records were deleted, 24,688 were edited, and 3,339 were merged. For the PrairieCat cleanup project, 5,124 bibliographic records were enhanced or identified as merges. World language bibliographic records that the CMC staff originally cataloged or enhanced include Arabic, Chinese, French, German, Hebrew, Indonesian, Korean, Latin, Ladino, Malay, Papuan, Persian, Portuguese, Quechua, Russian, Spanish, Thai, Tibetan, and Yiddish. Forty-one items were uploaded to CONTENTdm, and 54.5 hours of transcriptions on oral histories were completed.

Twenty-five CE courses were completed by staff, and ten Online with the CMC sessions were presented. Presentations were also given at Reaching Forward South, Resource Sharing Alliance (RSA) Day, PrairieCat Users Group (PUG) Day, CARLI Q&A, the Illinois Library Association (ILA) Annual Conference, IHLS Member Day, and the Joliet Junior Cataloging and Classification class. Multiweek courses offered during the year included Cataloging 3D Objects: Kits and Realia, Subject Analysis, and Cataloging Basics.

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## **IHLS Report**

*Leslie Bednar, IHLS Executive Director*

IHLS is beginning FY2024 planning, which will lead to the creation of the operational plan and budget. CARLI and IHLS are furthering collaboration and will soon be sharing office space at the Champaign hub. The IHLS website has been updated and has helpful information available for members. In November, IHLS Member Day had 425 attendees and was the most successful Member Day to date. Public library per capita grants are due at the end of January. Member library certification is underway and runs through March. Board nomination invitations will be sent to library directors soon to fill the role of an academic library representative, a school library representative, a special library representative, and two public library representatives. An Automated Material Handling System (AMH) is being evaluated, and an ad hoc working group has been established to gather information.

*John Becker, IHLS Delivery and Facilities Director*

The IHLS Delivery and Facilities Director is in his tenth week at IHLS and has been going on delivery routes and hub visits as he becomes more familiar with the role. As he goes on routes, he hopes to meet more member library staff.

*Troy Brown, IHLS IT Director*

The IT Team recently said goodbye to a staff member, and interviews are being conducted to replace him. He was an invaluable member of the team and will be missed. The IT and software industry is largely moving to subscription-based services, which will impact IHLS overall in the future. The server hardware we have is still good for a few more years, but the IT Director is planning for future server software to be a subscription-based service. Financial information is being collected and will be discussed with the IHLS Finance Committee as more information is available. Aspen is an upcoming project that the IT department is looking into in terms of customization and usage. Overall, the software is well-supported by the Aspen team and is promising for our members. The current help ticket software, Spiceworks, will be replaced soon with FreeScout.

## **Proposals for Membership Vote**

Aspen Discovery – Members saw a video highlighting Aspen Discovery's features. A vote is needed to proceed with implementation for those who want Aspen. Members are encouraged to respond to the available RSVP form in addition to casting their membership vote to help SHARE gauge the viability and cost of Aspen.

SHARE Governance Changes – Proposed updates to SHARE Governance documents include edits to meeting schedules, updates to language, and a procedural change to identify an agency's designated contact.

Barcoding Certification Requirement and Refresher Training – SHARE bibliographic services created a barcoder refresher training course to reduce common violations of policies and procedures. Should the

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vote pass, staff with barcoding permissions will be required to complete the training every two years to ensure they are up to date on the best practices for barcoding. Certified catalogers will not be required to take the training; however, the SHARE Bibliographic Services Manager reserves the right to have catalogers in violation of policies and procedures take the training.

Problem Resolution for Bibliographic Services – Cataloging continuing education (CE) notifications will be sent four times per year to keep catalogers informed of how many remaining hours they need to complete to maintain their certification. The barcoder refresher training is referenced in the document, as well.

Bibliographic Services Training Form – This form was created to allow library staff to show interest in becoming a certified cataloger or a certified barcoder, or to work with serials and to show understanding of the process to become certified.

Revision to Graphic Novels Policy (Cataloging Libraries only) – The American Library Association (ALA) Graphic Novels and Comics Round Table (GNCRT) has changed its best practices so that a work is entered under the original author or creator rather than the adapter. The adapter should still be included as an added entry.

## **Committee Reports**

### *SHARE Bibliographic & Cataloging Standards Committee, Donna Schaal, Chair*

This year, the committee moved to add local subject headings to identify local authors, addressed PAL format DVDs and how to properly mark the record so that patrons are aware of possible compatibility issues, and added new thesauri to the current recommended list. There are 91 material types in the system, and discussion was held on whether this could be reduced. Preliminary discussions were held on assisting transitional members with barcoding services.

### *SHARE Circulation & Resource Sharing Committee, Cassandra Thompson, SHARE Director*

Aspen Discovery was discussed at length by the committee throughout the year, as well as procedural details for the McNaughton Book Leasing program. International DVDs were discussed by the committee and clear labeling on the packaging is recommended in addition to marking appropriate fields in the bibliographic record. In preparation for the AMH, barcodes are recommended to be placed on the outside of items while not covering any cataloging information. Renewal settings in Polaris were reverted to pre-pandemic settings to resolve the issue of item-level holds being overridden.

Adult patrons with prior juvenile fines were discussed at length and the committee determined that libraries should decide at the local level on how they would like to handle those fees or if they would like to give the patron a “clean slate” for their own library. If the patron was previously under another jurisdiction before aging out of the juvenile card, it is recommended to contact their previous library to communicate the patron has moved and decide together how to best handle the fees. The committee discussed waiving or collecting fines at fine-free libraries, and the committee determined that unless the patron is changing jurisdictions, the decision to waive fines belongs to the home library. Patrons should be allowed to pay the fine with the transacting library and that library can decide to retain the fine or remit

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payment to the patron's home library. Members are reminded when attaching notes to items through delivery to attach those notes in a way that will not damage the item. If a patron pays for a lost or damaged item, the transacting library should send payment to the owning library with a Lost Item Payment Form.

*SHARE E-Resources Committee, Danielle Beasley, SHARE Resource Sharing Specialist*

In March, the committee discussed changing the current fee allocations for the cloudLibrary group to allow more funds to be allocated for PPU spending. The new allocations put 60% towards collection development, 25% towards PPU, and 15% towards the platform fee. Approved changes to the existing collection development policy included the addition of a statement on how the collection is funded and a reconsideration procedure. In September, two new members joined the committee, and a new chair was appointed. cloudLibrary now allows limits to be set on how many PPU titles patrons can check out per month. In September, the limit was set at 4 PPU titles per month per patron to help the PPU monthly spending budget last further in the month for all patrons. Data will be collected throughout the year to allow for a more informed decision on how to help the funds last longer. Bibliotheca, our cloudLibrary vendor, is now offering Biblio+, a streaming platform that partners with libraries to provide access to film and television.

*SHARE Finance & Policy Committee, Miranda Shake, Chair*

In February, the committee was informed that the SHARE Reserve Fund was over one million dollars. The IHLS Finance Department reported that they had collected 99.1% of fees for services and materials by the May meeting and expenditures were 5.9% below the year-to-date budget. The Illinois State Library continued funding of the CARLI cleanup project. In September, Aspen was presented to the committee and pricing was discussed. A new member was welcomed to the committee. The financial review showed Illinois Funds was performing better than U.S. Bank in terms of interest and thus the IHLS Finance Department transferred one million dollars to take advantage of the better rate. The fee scale for members was reviewed and currently, the rates will stay the same for members in FY2024 unless a library's revenue changes. In November, a demo of Aspen was presented and member comment on the discovery layer was reviewed. The audited FY2022 financial update to the committee showed the fiscal year's combined unrestricted and committed funds totaled \$62,155 and the unrestricted, reserve, and committed funds totaled \$178,760. For FY2023, 91% of fees had been billed out and 96% had been collected. The committee voted to expand the affiliate program and allow a pilot project to proceed.

**Other News and Information**

Vote January 20, 2023

Prizes: Vicki Sexton won the SHARE Swag Bag, Kyla Waltermire won the Bayscan Receipt Paper, and Jill Pifer won the Bayscan Scanner.

Other: There is an opening on the SHARE Bibliographic and Cataloging Standards Committee.

**Questions & Answers**

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None

**Public Comment**

None

**Announcements**

None

**Adjournment:** Sarah Hill adjourned the meeting at 3:35 p.m.

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