Moving Forward – Summary Reports on Services
Revised September 8, 2014

I. Integrated Library System (ILS) General Definition[1] & MHLS Definition[2]

a. Plan of Service

    i. Goal Statement: MHLS will maintain, support and provide training for an ILS that responds to member library and patron needs.

    ii. Intended Result(s): A current, reliable, cost-sustainable ILS and support that provide:

        1. Member library staff and patrons with effective and efficient access to member library collections.

        2. Training of member library staff to use the ILS effectively.

        3. Full-service functionality and data collection capability.

        4. Patron-friendly features, including integrated discovery tools.

    iii. Evaluation Method(s):

        1. Ongoing review of anecdotal comments to ensure continuous improvement.

        2. Periodic review and analysis by the advisory committee of usage patterns, content errors, vendor data, and product comparisons.

        3. Number of training sessions, the number of member libraries attending this training, and training session evaluations to support continuous improvement.

        4. Survey member libraries regarding the effect of MHLS support and tools on ILS use and maintenance.

        5. Advisory committee will determine ways to validate patron satisfaction

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[1] GENERAL DEFINITION - An **integrated library system** (**ILS**), also known as a **library management system** (**LMS**), is an enterprise resource planning system for a library, used to track items owned, orders made, bills paid, and patrons who have borrowed. An ILS usually comprises a relational database, software to interact with that database, and two graphical user interfaces (one for patrons, one for staff). Most ILSes separate software functions into discrete programs called modules, each of them integrated with a unified interface. Examples of modules might include:

- acquisitions (ordering, receiving, and invoicing materials)
- cataloging (classifying and indexing materials)
- circulation (lending materials to patrons and receiving them back)
- serials (tracking magazine and newspaper holdings)
- the OPAC (public interface for users)

Each patron and item has a unique ID in the database that allows the ILS to track its activity. Larger libraries use an ILS to order and acquire, receive and invoice, catalog, circulate, track and shelve materials. Source: Wikipedia

[2] MHLS DEFINITION – For the purpose of the Moving Forward assessment, the ILS is Innovative Interfaces services provided to all 66 member libraries. These services are: 1) Sierra Services Platform; (2) Encore Duet; and (3) Hosted Services. MHLS Cataloging Services will be the subject of a complete Moving Forward assessment and is not included in the ILS assessment. Innovative Interfaces services, such as Teleforms/Self Checkout/Acquisitions, which are not provided to all 66 member libraries, will be assessed under the Plan of Service's Coordinated Services.

  iv. Annual Progress Report
    1. Worked with advisory committee throughout the year to review and respond to member library input to insure accuracy of data and reliability of access to member library collections.
    2. Provided 3 workshops and 65 on-site trainings at member libraries with a total attendance of 434; 99% of attendees reported it was worth their time. Developed a new Knowledge Base that had nearly 900 visits in 5 months, to insure effective use of the ILS. Administered listserv to provide a communications forum for issues related to circulation of materials among libraries.
    3. Coordinated a successful migration to Sierra by conducting a system-wide data clean-up and site visits at each library to insure a smooth transition to the new software.
    4. Negotiated no-cost enhancements to the ILS including 'Quick Click' module resulting in expediting bibliographic record additions, 'OCLC via Network' module resulting in more effective access to the OCLC client, and 'Patron Self-Registration' module resulting in enhanced opportunities for new library card registrations.
    5. Convened a Discovery Tools Sub-Committee to research improving OPAC search results for patrons, resulting in the consortium decision to implement an enhanced discovery interface for the OPAC (Encore).
    6. Added new patron-friendly readers advisory content enhancements to the OPAC through Novelist, and altered the design of the bibliographic pages to improve patron access to the additional information.

b. Outputs (2013 statistics)
    i. Number of ILS Searches = 6.7 million
    ii. Items Circulated via ILS = 4,110,132
    iii. Items Available via ILS = 2,308,356
    iv. Items Circulated for Borrowing/Loaning Between Libraries = 823,030
    v. Unique Bibliographic Records in ILS = 662,980
    vi. Number of new titles added = 36,867
    vii. Number of holdings added = 180,265
    viii. Training Sessions/Attendance = 68/464

c. Outcomes
    i. The staff of member libraries will more effectively and efficiently organize, manage, and share their collections.
    ii. The staff of member libraries will increase ILS skills and knowledge, providing improved services to library patron.
    iii. The staff and patrons of member libraries will have user friendly access to their collections via an ILS that meets the demands of the most sophisticated users.

iv.   Patrons of member libraries will be supported in their formal and informal educational
      endeavors by finding and using current, high-demand, and high-interest materials in a
      variety of formats.

d. Costs Associated with MHLS

MHLS STAFF	Percent ILS	Salary	Benefits	Other (e.g., Travel, Training)	ILS TOTAL
Eric[3]	.50	31,317	17,762	3,675	52,754
Nina[4]	.05	1,772	695	1,100	3,567
Joan[5]	.05	1,354	384		1,737
Robert[6]	.15	9,034	3,566	261	12,861
Gerry[7]	.20	7,766	4,824	150	12,741
Matt[8]	.15	2,878	564		3,442
Isaac[9]	.05	809	66		875
Merribeth[10]	.05	3,910	1,915		5,825
Tom S[11]	.05	6,150	1,868		8,018
					101,820

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[3] Duties include training, cooperative collection development, WebPac, ILS management, data management, reports, planning and implementing upgrades, enhancements, research, and consultations
[4] Duties include training
[5] Duties include billing members of Innovative services, receipting payment, and eCommerce processing
[6] Duties include training, days closed, logins, SQL reports, installs, WebPac
[7] Duties include training, phone support, templates, days closed, logins, installs WebPac, database maintenance
[8] Duties include phone support, new installs, days closed, logins
[9] Duties include phone support, new installs, days closed
[10] Duties include supporting the Directors Association in achieving its purpose which including having the ultimate responsibility for establishment, review, and modification of the policies and procedures for system automation
[11] Duties include supervising the Automated Systems Manager and supporting the Directors Association in achieving its purpose which including having the ultimate responsibility for establishment, review, and modification of the policies and procedures for system automation.

	Total Cost	ILS Cost	ILS TOTAL
INNOVATIVE SERVICES			
Sierra	102,000[12]	92,930	92,930
Encore	45,375	45,375	45,375
Hosting	30,000	30,000	30,000
			168,305
TELCOM SERVICES[i]			
Network & Phone Services[ii]	35,590 – 6,000 (Teleforms) = 29,590		
	Total Cost	**ILS Cost**	**ILS TOTAL**
IT SERVICES			
Hardware[iii]	12,500		
Software[iv]	7,000		
IT Supplies	2,500		
GENERAL OVERHEAD[v]			
Supplies	6,500		
Utilities	25,500		
Equipment Rental	16,500		
Professional Fees	23,000		
Custodial Supplies	1,800		
Other Operations/Maint	21,000		
Liability Insurance	15,408		
Postage	5,000		
TOTAL			

[12] Includes cost for Teleforms, Edifact, Acquisitions, Express Lane, Collection Agency

e. <u>Value of Services</u>

  i. Estimated Cost to Member Libraries to Provide Five (5) County Based Innovative Library Systems with Encore = $1,104,316

County	Estimated Market Cost[13] for Sierra, Encore, Hosting, Help Desk
Columbia	$127,391
Dutchess	$374,708
Greene	$110,148
Putnam	$238,488
Ulster	$253,581
TOTAL	$1,104,316

  ii. Innovative Training[14] = $139,200 plus travel
    1. Average cost for Innovative training per person = $300
    2. 434 Member Library Staff Attendance at Sierra training + 14 at Create Lists Training + 16 at Web management Reports Training = 464 X $300 = $139,200[15]

  iii. Integrated Library System Transactional Cost for Systems

Cost of ILS / Year	Statewide Average	MHLS
Per Title	$0.44	$0.31
Per Item	$0.16	$0.09
Per Cardholder	$1.29	$0.58
Per Transaction[16]	$0.11	$0.05

  iv. Hosted Services[17]
    1. Cost for MHLS to Provide Hosted Service at MHLS
    i. Servers = $150,000 (replacement on 5 year cycle)
    ii. Bandwidth = $24,000 yearly ($2,000 additional per month over current cost)
    iii. Software = $12,000 per year
    iv. Staff for 24/7 Hosting Services = $108,729 per year (2 IT Specialists salary/ benefits)

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[13] Sierra costs based on a minimum Innovative system of no more than 100,000 bibliographic records and 25 licenses. Encore and hosting costs based on fixed Innovation cost per system. Help Desk cost based on Innovative service hours per system size.

[14] MHLS provides training on demand and specific to member needs rather than vendor schedule and content.

[15] Does not include travel costs

[16] MHLS has high volume of transaction per system due to consolidation of five counties cooperating in shared ILS. Fixed cost are shared among 66 libraries

[17] Current annual III Hosted Service contract is $30,000 yearly

v. Value of Items Circulated for Borrowing/Loaning Between MHLS Member Libraries (2013) = $10,353,717

1. 823,030 items X $22.78[18] = $10,353,717

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[i] % of total Telcom costs – After staff FTE assigned, breakout of telecom costs by service (break out Teleforms & all other by staff FTE per service)

[ii] Minus Teleform costs

[iii] % of General Hardware/Software costs - After staff FTE assigned (allocate on a per staff calculation)

[iv] OCLC charges to Cataloging Services

[v] % of General Overhead costs - After staff FTE assigned (allocate on a per staff calculation)

DRAFT

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[18] $12.58 is the average price of children/young adult/adult hardcover books ($22.78) http://www.slj.com/2013/06/research/sljs-average-book-prices-2013/ plus the average price of CDs ($9.95) and DVDs ($5) http://www.maine.gov/msl/services/calculator.htm\.