



Moving Forward – DRAFT Template for Summary Reports on Services

I. Integrated Library System (ILS)¹

a. Plan of Services

- 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.
- 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

¹ 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



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. 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

MHLS STAFF	Percent ILS	Salary	Benefits	Other (e.g., Travel, Training)	ILS TOTAL
Eric ²	.50	31,164	18,211	3,675	53,050
Nina ³	.05	1,764	693	2,200	4,657
Joan ⁴	.06	1,624	459		2,083
Robert ⁵	.15	8,499	3,408	261	12,168
Gerry ⁶	.20	7,729	5,788	150	13,667
Matt ⁷	.15	2,864	557		3,421
Isaac ⁸	.05	805	64		869
Merribeth ⁹	.05	3,910	1,908		5,818
Tom S ¹⁰	.05	6,150	1,907		8,057
					103,790
	Total Cost	ILS Cost		ILS TOTAL	
INNOVATIVE SERVICES					
Sierra		102,000 ¹¹		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				

² Duties include training, cooperative collection development, WebPac, ILS management, data management, reports, planning and implementing upgrades, enhancements, research, and consultations

³ Duties include training

⁴ Duties include billing members of Innovative services, receipting payment, and eCommerce processing

⁵ Duties include training, days closed, logins, SQL reports, installs, WebPac

⁶ Duties include training, phone support, templates, days closed, logins, installs WebPac, database maintenance

⁷ Duties include phone support, new installs, days closed, logins

⁸ Duties include phone support, new installs, days closed

⁹ 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

¹⁰ 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.

¹¹ Includes cost for Teleforms, Edifact, Acquisitions, Express Lane, Collection Agency



	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		
OTHER			

e. Value of Services

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

County	Estimated Market Cost ¹² 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

¹² 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.



- ii. Innovative Training¹³ = \$130,200
1. Average cost for Innovative training per person = \$300
 2. 434 Member Library Staff Attendance X \$300 = \$130,200

iii. Integrated Library System Transactional Cost

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 ¹⁴	\$0.11	\$0.05

- iv. Value of Items Circulated for Borrowing/Loaning Between MHLS Member Libraries (2013) = \$18,748,623
1. 823,030 items X \$22.78¹⁵ = \$18,748,623

ⁱ % of total Telecom 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)

¹³ MHLS training on demand and specific to member needs

¹⁴ 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

¹⁵ \$22.78 is the average price of children, young adult, and adult hardcover books <http://www.slj.com/2013/06/research/sljs-average-book-prices-2013/>