Moving Forward – **Summary Report on Integrated Library System (ILS) Services** [1]
February 2016

A. Plan of Service

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

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

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

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

    c. Full-service functionality and data collection capability.

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

3. Evaluation Method(s):

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

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

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

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

    e. Advisory committee will determine ways to validate patron satisfaction

4. Annual Progress Report (2014)

    a. Conducted a detailed report analyzing the integrated library system section of the MHLS plan of service including the outputs, outcomes, resources allocated to the service, and determined the value/return on investment for MHLS integrated library system services. This was reviewed and discussed by the MHLS Directors Association and the MHLS Board of Trustees.

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[1] 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.

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] All training is reported in the Professional Development and Continuing Education section of Moving Forward.

Page **1** of **5**

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b. Conducted a detailed report analyzing MHLS cataloging services including the outputs, outcomes, resources allocated to the service, and determined the value/return on investment for MHLS cataloging services. This was reviewed and discussed by the MHLS Directors Association and the MHLS Board of Trustees.

c. 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.

d. ILS facilitated over 3.98 million circulations, and enabled sharing of over 918,000 items between member libraries as a result of patron requests.

e. Expanded the MHLS ILS Knowledge Base, used 3,400 times in 2014 by MHLS member library staff, to insure effective use of the ILS. Administered listserv to provide a communications forum for issues related to circulation of materials among libraries.

f. Implemented the consortium decision to migrate to an enhanced discovery interface for the OPAC (Innovative Interface Encore). Made site visits on request to 25 libraries to insure a smooth transition to the new interface.

g. Designed and conducted an Exemplar Search analysis to measure catalog quality (replicable search formulas intended to capture the most likely or typical patron search terms likely placed against out against our catalog) resulting in the new Encore catalog returning outstanding results.

h. Ticket system implemented for technology and ILS issues was used for 90% of member library support requests (over 50% of these tickets were resolved within 1 hour, approximately 85% of tickets were resolved within 24 hours), assisting MHLS in prioritizing issues, improved delegating of responsibilities, keep more accurate statistics, building a training and support knowledgebase, and maintaining open phone lines for emergencies that cannot be handled in other ways.

B. Outputs (2014)
1. Items Circulated via ILS = 3,995,055
2. Items Available via ILS = 3,070,664
3. Items Circulated for Borrowing/Loaning Between Libraries = 1,032,021
4. Unique Bibliographic Records in ILS = 675,919
5. Number of new titles added = 50,946
6. Number of holdings added 301,116
7. E-Commerce = 66 Member Libraries Provide Centralized e-Commerce Services

C. Outcomes
1. The staff of member libraries will more effectively and efficiently organize, manage, and share their collections.
2. The staff of member libraries will increase ILS skills and knowledge, providing improved services to library patron.

Page **2** of **5**

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3. 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.
4. 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 (2014)

MHLS STAFF	Percent ILS	Salary	Benefits	ILS TOTAL
Thomas/Eric[3]	35%	21,390	12,280	33,670
Nina[4]	10%	3,545	1,390	4,935
Joan[5]	5%	1,354	384	1,737
Robert[6]	35%	21,922	8,560	30,481
Gerry[7]	40%	15,533	9,649	25,181
Matt[8]	15%	2,414	474	2,888
Isaac[9]	10%	1,618	131	1,749
				100,642

CONTRACTED SERVICES[i]	Total Cost		ILS Cost	
Sierra	100,134[10]		95,998	
Encore	45,375		45,375	
Hosting	31,050		31,050	
PayPal	360		360	
			172,783	

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[3] Automation Coordinator is responsible for leading the development and administration of Automation Services in support of MHLS Plan of Service; manages the Integrated Library Platform (ILP) with vendor; supervises Cataloging Services; maintains technology documentation for resource sharing services; provides training and support to member libraries for use of the ILP; provides leadership in developing resource sharing standards and the implementation of new ILP technologies.

[4] Cataloging Specialist II performs and assists in the coordination of all cataloging duties including record loading and upkeep, member library data entry training, and development and observance of workflow best practices. Maintains and assists in the maintenance of staff cataloging proficiencies. Assists the Automation Coordinator in assuring that all cataloging operations adhere to the system's vision, goals, and objectives.

[5] Accounting Assistant duties include billing members of Innovative services, receipting payment, and eCommerce processing

[6] Technology Operations Manager oversees all cataloging, automation, and technical work performed by the Technology Operations Department. He/she shall design, develop, lead, and advocate for current department initiatives, projects, and operations, and provides leadership and strategic thinking toward those to be performed in the future. He/she shall further delegate project and operational work to the Automation Coordinator and IT Coordinator roles, and report on progress to the Executive Director, Director's Association, and MHLS Board of Trustees as requested.

[7] Information Technology Coordinator manages and assists in the management of all Information Technology (IT) projects and operations. In this role they supervise the activities performed by IT support staff, coordinate project resources, IT contracts, and related equipment purchasing, and leads and assists in leading IT initiatives as directed by the Technology Operations Manager. The IT Coordinator also leads the ongoing upkeep and maintenance of internal IT infrastructure and recommends improvements as necessary.

[8] Tech Support Specialist duties include phone support, new installs, days closed, logins, novelist

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

TELCOM SERVICES	Total Cost	ILS Cost
Network & Phone Services[ii]	30,325 – 5,596 (Teleforms) = 24,729	2,650
		2,650
IT SERVICES	Total Cost	ILS Cost
Hardware[iii]	9,083	973
Software[iv]	5,445	583
IT Supplies	2,213	237
		1,794
GENERAL OVERHEAD[v]	Total Cost	ILS Cost
Supplies	5,732	614
Equipment Rental	16,472	1,765
Professional Fees	25,189	2,699
Postage	4,505-2,875 (ILL) = 1,630	175
		5,253
FACILITIES OVERHEAD[vi]	Total Cost	ILS Services Cost
Staff/Benefits	51,696	5,540
Utilities	27,973	2,998
Custodial Supplies	1,736	186
Other Operations/Maint	35,776	3,834
Liability Insurance	15,423	1,653
		14,210
ADMINISTRATIVE SUPPORT[vii]	Total Cost	ILS Services Cost
Staff/Benefits	361,059	38,691
Professional Development	31,532	3,379
		42,070
TOTAL		**339,403**

E. Primary Funding Sources

1. State Aid - General
2. Member Assessment Fees
3. State Aid – Restricted – Categorical: Central Library Development Aid

Page **4** of **5**

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F. Value of Services

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

County	Estimated Market Cost[11] 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

2. 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[12]	$0.11	$0.05

3. Hosted Services[13]
   a. Cost for MHLS to Provide Hosted Service at MHLS
      1) Servers = $150,000 (replacement on 5 year cycle)
      2) Bandwidth = $24,000 yearly ($2,000 additional per month over current cost)
      3) Software = $12,000 per year
      4) Staff for 24/7 Hosting Services = $108,729 per year (2 IT Specialists salary/ benefits)
4. Value of Items Circulated for Borrowing/Loaning Between MHLS Member Libraries (2014) = $12,023,044
   a. 1,032,021 items X $11.65[14] = $12,023,044

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[i] Vendor/constrator provided services/products

[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)

[vi] Ibid.

[vii] Ibid.

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[11] 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.

[12] 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

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

[14] Average value of library item borrowed is $17 for Adult Book, $12 for YA Book, $17 for Children's Book, $9.95 Audiobook, $4 Movies, $9.95 CD = Average price per item = $11.65 – Library Value Calculator http://www.ala.org/advocacy/advleg/advocacyuniversity/toolkit/makingthecase/library_calculator

Page **5** of **5**

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