NLLS Report:

Response to Library Manager's Council Meeting on Departments

On February 28th 2018, the Library Manager's Council held an in- camera session at the meeting held at headquarters, Elk Point. Management and staff encouraged the session as it allows for the Library Managers to speak freely amongst their peers about any issues that they may be having. A list was produced from the meeting emphasizing issues in each department: Administration, Public Services, Bibliographic Services, IT services, Marketing and Communications.

The Library Managers then highlighted their top two issues from each department that they wanted the staff of Northern Lights Library System to address.

<u>Administration</u>

1. Improved communication (phone calls/ reports) and understanding of NLLS staff roles.

- Phone calls: The library managers have to understand that HQ staff have 47 libraries that they have to attend to. Each staff member will answer those calls in order, as well as address any tickets in the order they come in through the help desk. Depending on the nature of the enquiry, a call can last for only a few minutes to over an hour if the call goes to "go to assist." HQ staff also frequently experience calls where there is more than one question that the library originally asked and as a result this call takes longer and time away from answering questions for library managers in the queue. Due to our staff being able to visit our libraries more frequently and have better professional development opportunities means that they are on the road more often and are not able to answer the phone calls for one to a few days. To be fair to those who have placed a help desk ticket, the staff member will prioritise all queries by the time stamp, whether is be a phone call or via a help desk ticket.

  Action: All staff will put an out of office, out going message, when they are away for more than a day.

  Action: If the library manager calls and gets the out-going message they are encouraged to put in a help desk ticket as this will put their enquiry in order, plus another member of staff may be able to address the issue.

  Action: We have experienced tickets sitting in the helpdesk and not being answered, due to staffing changes, however, this has since been addressed. Tickets will stay open until finalized; for instance, when a site visit has been completed or a computer goes back to the library the ticket will then close.

  Action: Tickets may also have multiple enquiries within them and as a result will bounce between departments. We encourage libraries to put in **ONE** ticket for one enquiry only.

  Action: When staff members are away on holiday they will leave an out of office message on their phone stating so. In such cases a help desk ticket is the best option for service.

  Action: Policy will be developed on response times for returning calls.

  Action: If a library manager feels that their help desk ticket has not been answered sufficiently they can place a complaint to the Department Manager, and or the Executive Director and the Assistant Director to review. Please respond through email with the Help Desk ticket number.

- Reports: NLLS management try to stay as current as they can in their reports.
  ==Action:== for the LMC meeting, all reports will be put on the NLLS website one week ahead of the meeting and any additions will be addressed as an addendum at the meeting.

  Question: Would library managers prefer to also have the reports emailed a week ahead of time?

- NLLS Staff Directory: this is a brilliant idea and Heather in Marketing and Communications will design the directory as follows for each staff member.
  Photo – job title – responsibility

  ==Action:== To be placed on the contact info page on the website (brief description)
  ==Action:== Paper copy of the directory available to be sent out to libraries (in depth description)
  ==Action:== Digital copy of the directory under Manager's section of the website (in depth description)

  NLLS would also like something similar from our libraries, quite often important staff members change and NLLS is not informed.

2. Email with the breakdown of online payments from NLLS including more specific details.

   - ==Action:== The Finance Officer has since addressed this concern and has added more details to the Electronic Fund Transfer (EFT) to assist the libraries in their own accounting. For instance, LMC – 0310 will now say LMC – Mileage – 0310.

IT Department

1. Polaris issues are still not resolved and are affecting the quality of service provided by the member libraries and NLLS need to have trained staff to handle our issues with Polaris.

   This is a two-part question
   i)   Polaris issues are still not resolved and are affecting the quality of service provided by the member libraries:

   - Latency issues cannot be resolved by the NLLS IT department as this is an Innovative problem that TRAC HQ at Yellowhead can only deal with.

   - As explained by the Executive Director at the LMC meeting Feb 2018, Polaris has seen significant latency issues since the last upgrade, this could be due to the staffing changes at Innovative and the delay in patching the upgrade.

- ALL of TRAC are experiencing the very same issues, not just NLLS. The Director will come back with a report and possible decision from the TRAC Directors meeting with Innovative for possible solutions.

- Action: The Executive Director informed the LMC that a meeting will be held with the TRAC Directors and a team of Innovative staff, including the CEO, on the 12th April, in Calgary.

  Update: the patch has since been implemented and the latency issues have been resolved.

  Update: The meeting with Innovative was very successful, an action plan is being developed. Please see attached notes of the TRAC meeting with Innovative.

ii) NLLS need to have trained staff to handle our issues with Polaris

- IT Staff DO NOT train Library Managers on how to use Polaris – this is a Public Services requirement. The IT Manager is responsible for the functionality of Polaris. Her job is to deal only with the Administration (the back end) of the ILS.
- Action: To avoid confusion, the IT Manger will now be known as the Polaris Administrator and a Public Services Consultant will be known as the Polaris Expert.

  ♦ Please see notes in Public Services for training on Polaris.

2. More training for libraries on Polaris, Office 365 and new resources

   Polaris
- IT departments job is to implement and make sure that the software and hardware is up and running and maintained. It is not (nor has it ever been) ITs job to train the library managers on Polaris. Please note that any training that the IT staff attend for Polaris, Office 365 and new resources is strictly for maintenance and administration purposes and will not be useful to managers.

   Office 365

- Action: Microsoft also offers a lot of training videos for office 365 that can be found by going the Office 365 Training Center which all librarians can access for free. Course start with beginner course up to expert.

- Action We are currently looking into options for Office 365 training, The IT staff will be in the workshop only to help and will not be doing the training.

- Librarians are expected to know the basics of office (i.e. word/excel) and email. NLLS is not responsible for training on basic computer program functionality.

New resources

- New resources and Polaris training will be administered through the Public Services Department

- Question: We will need more clarification on what training is needed on which resources and to prioritise which ones they want training in first. We understand that each library has different needs, but if there is a common need for training in a particular resource NLLS will provide regional training.

<u>Bibliographic Services Department</u>

1. Faster cataloguing and return time on orders with some verification of collections codes

Another 2 part question:

- Faster cataloguing and return time on orders: There has been a backlog of books in the cataloguing department due to Margaret going to part time, but also the libraries are spending a lot more of their book allotment money.

  Action: Margaret, our part time cataloguer, will be fully retired by the summer and NLLS will post a position for a full-time cataloguer to replace her.

  Update: Cataloguing position has been posted.

- Verification of Collection codes.

  Potentially two issues:
  1. Each library is autonomous, and each have their own unique set of collection codes and spine labels. What the managers see in Polaris is not what the NLLS staff see. As a library you will only deal with your own dropdown menus of your collection. However, at NLLS, because we are linked to 3 other systems on the administrations side, we see all the dropdowns for ALL the libraries within TRAC, over 170. As you can imagine from time to time a staff member can make a mistake and choose the wrong drop down.
  2. IF through acquisitions the manager has chosen the wrong collection code, the staff at **NLLS WILL NOT** make the decision to change the item to a different collection. NLLS does not know your collection and it is up to the library to make sure that the correct collection is chosen during ordering.

  Action: the solution to both these issues is to standardize all NLLS collection codes for uniformity, this will ensure that there will be no mistakes in ordering and during

cataloguing. NLLS will work with the bare minimum for collection codes, for instance Mystery, Romance, Sci-Fi, Etc. will now all come under the collection code of Fiction, the library will then further break down this collection by shelf location when the item is delivered to their library.

<mark>Action:</mark> After the LMC meeting the standardization of collection codes will begin.

<mark>Action:</mark> Bibliographic Services will be contacting libraries for an updated list of shelf locations from each library.

2   Solutions for issues with new books going to other libraries first.

- The decision to have the hold processing first came from bibliographic services department, but it has always been the library managers decision at the library managers council meeting to vote on the hold processing of these additional items. We know that it is lovely for the library to handle their new books first, but if that new book has a hold on it then it seems a bit redundant to pack it up on the van run, to then unpack it at the library, to then repack it on the van run to send it back to HQ. If there are 10 holds on the item and a patron of the owning library wants that new item then that owning library patron jumps to the top of the queue; the patron and the owning library will get that item first. Just because it is brand new what use is the book to sit on a shelf when it can be circulated.

  <mark>Action:</mark> take this back the LMC, this is not an NLLS issue, but a decision made by the managers at the LMC.

Public Services

1.   Training for new managers needs to be improved through the use of a mentorship program as mentioned in the NLLS POS with funding provided by NLLS

- <mark>Action</mark>: Hired two consultants for the Public Services Department
- <mark>Action:</mark> instead of new hires coming to NLLS for Orientation first, NLLS will visit the new librarian in their own setting, PS, BS, IT and Marketing will do individual visits so that the library manager is not overwhelmed with new and important information. Once comfortable the library manager will then visit NLLS for an orientation of what we do at HQ and ask any further questions.
- <mark>Action:</mark> PS consultant will arrange a visit to neighboring libraries with the new librarian to introduce them to their peers.

  Mentorship program came about because of the turnover of Public Service two years ago and NLLS is still trying to play catch up. With new hires and new strategies this will be re-visited in the final year of the POS

2. More training on Polaris for NLLS Staff and Library Managers

- Action: Kayla Lorenzen is currently training new consultant on Polaris; Anna in June!
- Action: With content provided by Public Services, the Marketing Manager will provide training video's and pamphlets on Polaris
- Action: When consultants have been trained, they will provide training in regions and one on one.
- Library managers can access Polaris tip sheets through Polaris on the main top bar of the ILS under HELP. Library managers can find all the information by using keyword search. Example will be demonstrated at the Library Manager's Council meeting. Demonstration will be provided at the LMC.

Marketing and Communications

1. More tutorials in Niche Academy, radio clips, updated posters and brochures that are customizable, editable and professional looking access to royalty free images.

- Making all of these marketing tools available takes a vast amount of time.
- Action: Many of our brochures and posters need to be updated
- Update: Public Services are currently working on content for updates while the Marketing Manger is working on format and design.
- Update: NLLS have started on Poster and brochure updates. Editable Posters and Brochures have been created in a word document for libraries to use and Royalty free images can be found on resources website, links have been shared for e-resource royalty free images.
- Update: Brochures: OverDrive, RBDigtal. Pronunciator have been created and are available on the website Poster: virtual reality, summer reading club, woodwork pattern poster sent out via email
- Update. 7 systems collaborations has been initiated by NLLS for template sharing.
- Library Managers need to prioritise on what tutorials are the most important to them
- Radio Clips. The marketing manager needs clarification on what they are looking for

2. Training for Library Manager's and NLLS Staff, plus assistance with library website

   Training for Library Manager's and NLLS Staff.
- Clarification is needed on what the library managers are requesting on the first part of the question

   Assistance with library website
- Because of how NLLS is set up with our websites means that we do not have complete control. However, some aspects of the websites such as blogs, latest news, calendars and events can be maintained by libraries
- Action: Marketing Manager will begin training modules on website maintenance by Town Life.

- Update: Links have been sent out for training purposes on RBDigital and Pronunciator.