



ANNUAL REPORT

July 1, 2017 – June 30, 2018

OVERVIEW

In fiscal year 2017 CCS focused on laying the foundations for the relationships, tools, and strategies that we would need for a successful ILS migration. This year we implemented those tools and strategies, which led not only to configuring the database and migrating data, but also to moving CCS forward in our path to greater engagement. In the central office and across the membership, we worked to streamline workflows, update decision-making processes, and solidify our shared understanding of the system that connects us. Through the communication framework established as part of the migration strategy, we engaged with a more diverse set of library staff, setting the stage for future partnerships.

As we move into fiscal year 2019, we'll continue to add services to increase the value of CCS, and work with libraries to identify which services would have the greatest impact for patrons and library staff. Planned projects include refreshing web reports, adding more e-content options in the PAC, and establishing methods for user testing. We will also be welcoming Morton Grove Public Library to CCS, the first new member added since 2011.

We will continue work to demonstrate the value of CCS membership. As a start, we can look at the cost of the major subscription services included in CCS membership and the power of group purchasing:

- Full service ILS with web-based staff client, responsive PAC, e-content integration
- EBSCO Novelist Select, Novelist Plus, Novelist K-8 Plus, Library Aware
- Syndetics Enriched Content for PAC, including cover images, summaries, table of content, first chapters, video and music, and three professional review sources

- Comprise Hosted SmartPay for online payments

In the chart to the right, are estimates for comparable subscription packages if they had been purchased individually by libraries.

	Population	Estimate
Small	10,000-30,000	\$ 61,000
Medium	30,000-60,000	\$ 73,000
Large	60,000+	\$ 150,000

The next step is to quantify value-added services provided by CCS, such as system administration, support and troubleshooting, training and networking opportunities, authority control, and custom reporting to develop a fuller picture of each library’s return on investment.

ILS MIGRATION

Migration

July 2017 – June 2018

Value, Learning, Data, Horizon

In April 2018, CCS went live on Innovative Interfaces, Inc. (III) Polaris. This was a multi-year project, beginning in March 2016 with our needs assessment known as Project Laulima, followed by the selection and implementation processes.

KEY MILESTONES

Profiling complete	August 1, 2017
Mapping complete	August 31, 2017
Test data load complete	September 6, 2017
Configuration complete	March 30, 2018
Go live	April 17, 2018

The migration project cost \$803,970, over \$39,000 under our budgeted \$843,813. These costs included migration services from III and Phoenix 10, implementation fees for Comprise, a new telephony server, and year one subscription fees for Polaris and Comprise.

We implemented the strategy we had designed in FY 16-17 to encourage library staff participation while maintaining efficiency. We anticipated the following outcomes from a successful implementation of the migration strategy:

- Develop a framework for effective communication
- Create clear, consistent documentation
- Engender a greater sense of ownership in the ILS among library staff

Governing Board also set the following project guidelines:

- Deliver the optimal patron experience
- Move toward standardization
- Enable comparative reporting
- Save library staff time

These were the touchstones that CCS staff, library staff advisory groups, individual libraries, and Governing Board used when making decisions and implementing features.

While as of June 30, 2018 there is still more work to do on the migration project, CCS staff and membership have made great strides in working towards the expressed outcomes.

Deliver the optimal patron experience

One of the primary goals in the ILS selection process was to identify the solution with the most patron-friendly features. Keeping the patron experience as the touchstone during profiling and implementation was the logical next step. In addition to working with library staff advisory groups to improve the patron experience when engaging with library materials or the online catalog, CCS staff worked to minimize time spent offline during go live. Ultimately, we eliminated two planned days of offline.

When we considered standardizing practices, CCS staff and library staff advisory groups always looked to be more generous to patrons, rather than take away services or impose harsher penalties.

PowerPAC

- Implemented username option for all patrons
- Allowed patron to select pickup location, including drive-up windows in the PAC
- Provided patron-facing instructional videos which were viewed over 1000 times
- Integrated direct-download e-content from Overdrive, Axis 360, and Cloud Library. Additional non-integrated e-content records will be added in Q1 FY 18-19, and Recorded Books integration will be available with the next Polaris release

Circulation and Holds

- Expanded notice offerings in terms of format and content
- Streamlined patron notice preference selection
- Implemented autorenewal at all libraries
- Will engage in user testing in FY 19-20 to improve notice language and organization

- Reaffirmed some Symphony practices, such as limited processing fees and following the transaction library’s loan policies

Move towards standardization

The Governing Board expressed a desire to simplify configuration of the ILS, regardless of which ILS was selected. To identify which elements of configuration would be standardized, CCS staff worked with Innovative and library staff advisory groups to determine which components must be standardized due to system configuration and which other components would provide patrons with a better experience if standardized.

The table below outlines the results of standardization of ILS policies.

Symphony		Polaris	
Policy	Count	Policy	Count
Item Type	328	Material Type	74
Item Cat 1	1052	Item Stat Class	223
Bill Reason	193	Fee Description	40
Circ Rule	836	no equivalent	
Loan Period	40	Loan Period Codes	53
Bill Structure	201	Fine Code	67
User Profiles	742	Patron Codes	150
User Cat 1	1632	Patron Stat Class	20

In addition to standardizing policies, CCS and libraries worked to standardize practices as well. These include patron data entry, ecommerce payment system, renewals and autorenewals, notice and billing schedules, and organization of facets for limiting online catalog searches.

Future steps towards standardization may include consolidating loan periods and/or fine structures. CCS will continue to work with library staff to identify best practices for library procedures, and we are implementing ongoing training to encourage adoption of these procedures.

Enable comparative reporting

Another advantage to streamlining ILS policies is to enable comparative reporting across libraries.

Collection, Material Type, and Item Stat class are consistent across libraries, as are Patron Stat Codes. This

structure of standardized ILS policies sets CCS and libraries up to develop system-wide reports. This comparative reporting will provide more context for library statistics to help libraries tell their stories to their communities. The next steps in this process are customized on-site reports training at libraries in Q1 and Q2 of FY 18-19 and a data summit for library administrators in Q4.

Save library staff time

- Focus on acquisitions workflow and training to encourage implementation of automated processes
- Use of automated calling to reduce staff time spent on holds processing
- Enhanced pick-up window functionality to reduce manual processes
- Redesign of Web Reports began in May 2018 and will continue into FY 18-19
- Clarify library and CCS roles in managing e-content, centralizing to maximize efficiency

Develop a framework for effective communication

Member engagement was a major focus of FY 16-17, to build the trust necessary for a successful ILS migration. We continued that work this year by developing a suite of communication and learning opportunities for libraries including:

- Weekly newsletters
- Surveys to gather feedback
- Online portal for documentation and project news
- Library staff advisory groups
- Technical groups
- In-person training at the central office
- On-site visits and trainings at libraries

Migration newsletters reached an average of 542 staff members. On average, 42% of those staff members (229) opened the emails.

Between CCS and Polaris-led training, we offered 70 sessions totaling 397 hours of training through June 2018, for 904 participants. During the same period we visited 12 libraries for migration-specific library visits.

Create clear, consistent documentation

The migration portal had over 65,000 page views during the migration, with peak usage occurring in March and April.

We also published 40 videos, including Two Minute Tutorials, webinar recordings, and patron-facing videos. In FY 17-18 these videos garnered a combined 15,800 views. Two Minute Tutorials “Searching for an Item in Leap” and “Looking at an Item Record in Leap” have each been viewed over 1000 times, and “Getting Started with Leap” has been viewed over 2000 times.

Promote a greater sense of ownership in the ILS among library staff

By using a train-the-trainer approach, we empowered library staff to become local experts, and have been pleased by the kinds of in-depth, thoughtful questions and suggestions that library staff have shared with us. We are also happy to be continuing to tap into the expertise among library staff by partnering with library staff advisory groups.

All library staff have been encouraged to sign up for an Idea Lab account, which we will continue to promote in FY 18-19. The Idea Lab is a partnership between Innovative Interfaces and the Innovative Users Group to share, vet, and select enhancements for the ILS. In the first Idea Lab challenge presented, an enhancement idea submitted by a CCS library staff member was the 5th most voted for out of 113 submissions.

In FY 18-19, CCS will be working more closely with technical group chairs to make the best use of staff time during meetings, starting with a Running Effective Meetings training session in July 2018.

STRATEGIC PLAN PROGRESS

The strategic plan guides our work at CCS. For each of the accomplishments highlighted below, you'll see one or more keywords identifying which initiatives of the strategic plan the project fulfills.

Value	Initiative A: Increase Value of CCS
Balance	Initiative B: Formalize CCS Posture
Learning	Initiative C: Increase Shared Learning
Data	Initiative D: Make the Data Useful
Horizon	Initiative E: Answer the "What's Out There?" Question
Governance	Initiative F: Consider Structure Organization
Digital	Initiative G: Developed a Clear Digital Content Strategy

Update CCS Office Space

July 2017 – September 2017

Value, Learning

CCS staff implemented the plan developed in FY 16-17, resulting in a flexible meeting and training space at the CCS office. CCS can accommodate meetings of up to 20 participants, and hands on training of 16. This space was invaluable during the migration, given the high volume of training offered during the migration. The total cost of the update, furniture, and equipment was \$101,126, expended in FY 16-17 and FY 17-18.

Fresh Desk Implementation

July 2017-August 2017

Value

Library staff began using Fresh Desk in August 2017. New features for library staff include the ability to create and update tickets via email, close tickets in the portal, and allow specified staff members to view all tickets for their library. These features save library staff time when creating and managing tickets, and provide an additional opportunity for internal communication. CCS staff have access to more tools for categorizing and tracking tickets and enhanced reporting, which helps us prioritize and manage incoming requests.

PERSONNEL UPDATES

CCS Staff Changes

Kathy Schmidt starts as Member Services Librarian, August 2017

Professional Development Activities

June 2017

Wisconsin Illinois Innovative Users Group: Mieko Landers

August 2017-November 2017

PHR/SPHR Certification Study Course: Beth Stoneburner

June 2018

Innovative Interfaces SQL Training: Bob Barth, Mieko Fujiura-Landers, Kathy Schmidt, Debra Wischmeyer

Library Leadership Changes

Heather McCammond-Watts resigns from Wilmette, April 2018

Heidi Smith starts at Park Ridge, April 2018

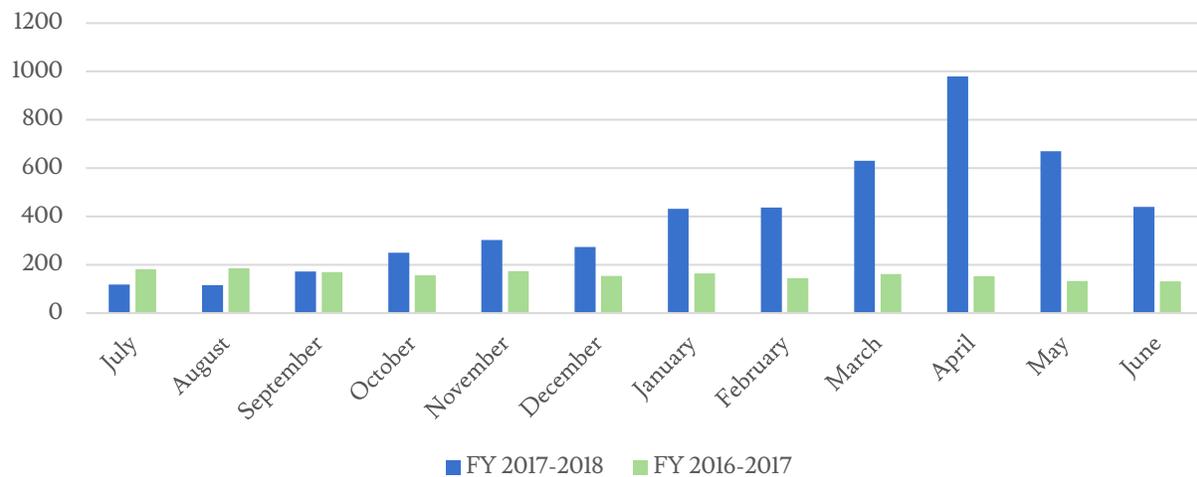
Mick Jacobsen starts at Zion-Benton, May 2018

STATISTICS

CCS SUPPORT DESK

	Fiscal Year 2017-2018	Fiscal Year 2016-2017	Percent Change
Tickets Opened	4698	1905	146.61%
Tickets Closed	4010	1779	125.41%

Tickets Opened by Month



We anticipated an increase in ticket volume due to the migration, which is illustrated here. As we move into FY 18-19, ticket volume will continue to fall, though may not return to FY 16-17 levels.

TRAINING SESSIONS

	Sessions	Hours	Registrations
Polaris-led	24	251	317
CCS-led	46	146	587
Total	70	397	904

SHARED CCS DATABASE

	Fiscal Year 2017-2018	Fiscal Year 2016-2017	Percent Change
MARC Records	1,233,943	1,157,282	6.62%
Authority Records	919,806	898,821	2.33%
Item Records	6,096,600	5,531,801	10.21%
User Records	475,220	595,927	-20.26%
Checkouts & Renewals	12,768,269	13,239,418	-3.56%
Local Transactions	10,335,765		
Intra-CCS Reciprocal Borrowing	816,492		
Other Reciprocal Borrowing	885,273		
Intra-CCS ILL	678,633	706,731	-3.98%
Other CCS Sent ILL	52,106	53,361	-2.35%
Holds Placed	1,584,585	1,681,156	-5.74%
E-Content Records Titles Added	142,091	2,472	5648.02%

The significant increase in e-content records added contributed to the increase in MARC and item records. Polaris direct download e-content integration includes Axis 360, Cloud Library, and Overdrive.

The decrease in user records is the result of a more aggressive database maintenance program, which will remove inactive patron accounts where less than \$15 is owed.

NAME AUTHORITY COOPERATIVE PROGRAM (NACO) WORK

	Fiscal Year 2017-2018	Fiscal Year 2016-2017	Percent Change
Names Added	704	642	9.66%
Names Changed	1295	829	5.62%
Series Added	37	41	-9.8%
Series Changed	15	20	-25%

NACO statistics include work done by NACO contributing library staff.