Library Managers' Handbook

This manual is designed for use by library managers and staff of Shortgrass Library System member libraries.

Last updated: June 27, 2019
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Introduction

Welcome! This manual is intended for use by managers and staff working in Shortgrass Library System (SLS) member libraries. Whether you are just learning the ropes of your position or you are a veteran library manager, we are sure that the information contained in this volume will be highly useful to you.

This manual is just one of many tools available to help you succeed in your position as library manager. Make sure you familiarize yourself with it, and do not be shy about asking questions! Other ways you can become comfortable with the system and its services include:

- Visit the Shortgrass website (http://www.shortgrass.ca) to see what services are available to you and your patrons;
- Get in touch with our Chief Executive Officer, Client Services Librarian, and/or Manager of Systems and Technical Services to find out more about how we support your library (and don't worry -- we'll be in touch as well);
- Familiarize yourself with your library's services and collections. Make note of all your questions and don't be afraid to ask them;
- Review your library's Plan of Service and ask your library board if you have any questions about the document's development or contents. If your plan is expired or close to expiring, contact SLS headquarters or PLSB for more information.
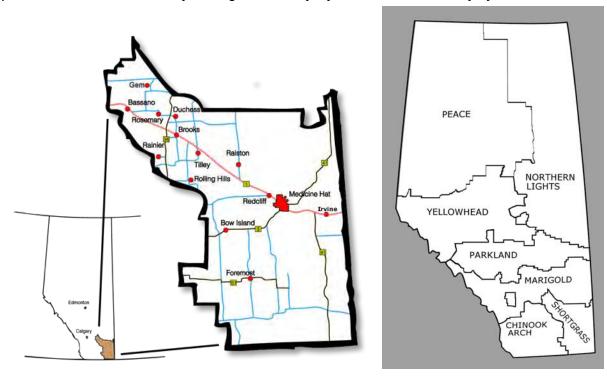
What is a Regional Library System?

A library system is a collaborative solution for providing cost-effective and efficient public library services. There are seven regional library systems serving Alberta: Shortgrass, Chinook Arch, Marigold, Parkland, Northern Lights, Yellowhead, and Peace. Shortgrass Library System consists of 14 individual member libraries organized in a system that collectively serves the library needs of southeastern Alberta.

Like peanut butter and chocolate or pineapple on pizza, some things are just better together, and that includes libraries! By working together as a unit, Shortgrass member libraries are able to accomplish more and provide stronger services to library patrons than any one library could do on its own. As a result of combining resources, all member libraries are able to offer their patrons a much wider variety of materials and resources than they would otherwise be able to do alone.

At Shortgrass headquarters in Medicine Hat, a team of (absolutely lovely) library specialists work hard to ensure that member libraries receive stellar service and assistance. Between consulting, ordering, processing, and cataloguing materials, maintaining technical services, and more, the team is always busy working to provide the strongest services possible.

Maps below: the area served by Shortgrass Library System; Alberta's library systems.

SHORTGRASS LIBRARY SYSTEM

Key Facts
105,725 Population
26,590 m2
11 Municipalities
14 Member Libraries

Plan of Service
2017-2019

MISSION STATEMENT:

Shortgrass Library System provides quality library support services to member municipalities and partners.

VALUES:

- Sustainable, Flexible & Efficient High Quality Service
- Innovation
- People (Internal/External)
- Fiscal Responsibility
- Intellectual Freedom

GOAL 1

Ensure regular, meaningful communication between SLS staff and board, member library staff & boards, municipalities, contracted partners and stakeholders.

OBJECTIVES:
- Continue publication of quarterly newsletter.
- Provide regular email updates.
- Share Board meeting minutes via email, once approved.

GOAL 2

Provide sustainable, flexible, innovative and responsive services in all areas of system operations.

OBJECTIVES:
- Continue providing regular opportunities for member library feedback.
- Evaluate staff satisfaction to ensure sustainability of services.
- Evaluate operations based on Lean Six Sigma principles.
- Facilitate the provision of library resources to meet the needs of our communities.
- Develop relevant & timely performance measures to allow for objective evaluation of services.
- Employ suitably qualified staff to ensure provision of excellent services.
- Participate in the Provincial Resource Sharing Network.

GOAL 3

Strive to ensure reliable, high speed internet is provided at all member libraries.

OBJECTIVES:
- Collaborate with Public Library Services Branch, SuperNet providers and municipal partners to improve current service levels.
- Explore funding opportunities to enhance services in area with less reliable connections.
- Maintain technology infrastructure necessary to provide high speed internet at member libraries.
- Employ suitably trained staff to manage technology infrastructure and provide IT support services.

GOAL 4

Provide relevant, high quality training opportunities in a variety of formats to member libraries and SLS staff.

OBJECTIVES:
- Continue holding PD Day every two years.
- Provide guest speakers and training at member library meetings.
- Share relevant external training and learning opportunities in a timely manner.
- Allocate operating budget funds to pay for training opportunities.
- Employ suitably qualified staff to provide training opportunities.

GOAL 5

Provide support for member library advocacy efforts.

OBJECTIVES:
- Continue to allocate system financial resources.
- Offer training opportunities on advocacy & marketing.
- Ensure suitably trained staff are available to assist member libraries.
- Collaborate with design professionals in the creation of advocacy materials.

The Goals & Objectives identified in this Plan of Service are the result of an in-person needs assessment session conducted on June 15th, 2016.

Shortgrass Library System History

It took a while, but it happened: while the earliest discussions about creating a library system for southeastern Alberta took place as far back as 1977, it was not until 1988 that Shortgrass Library System was confirmed as Alberta's fifth regional library system.

The ball really started rolling in 1981 at the Alberta Library Conference, when staff and trustees from various libraries in the area met to discuss the potential for a regional system. As a result of this initial meeting, an organizational meeting was held in Redcliff in June 1981. The group applied to the Alberta Library Trustees Association for financial assistance, and received $5000 of seed money. A further two meetings, attended by representatives from Brooks, Bassano, and Burdett. A further three meetings were held in 1982, this time also attended by representatives from Duchess; at the final meeting in 1982, the system's boundaries were established and the name "Shortgrass" was confirmed. In 1983, the Committee was restructured to allow for both improved communication and representation from boards and from councils that did not have boards. That year, the committee also obtained letters of support from boards and councils representing 89% of the local population, and applied for a $5000 grant from Alberta Culture.

The hard work continued in the following few years, as the committee continued to establish itself and create connections with supporting libraries. A logo (still in use to this day) was approved, and the executive agreed that a proposal for service be prepared and promoted to all boards and councils by early 1986. In March 1988, the province announced that Shortgrass Library System would be Alberta's fifth regional library system.

Things started progressing quickly. Colleen Swift was hired as the system's first Director in 1988, and municipalities were invited to bid on the location for SLS headquarters. After some discussion, Medicine Hat was chosen, and the search for a suitable location began. Ground was broken on the present-day HQ site in September 1989. The first book was also ordered, catalogued, processed, and delivered by Shortgrass that year.

Over the years, Shortgrass continued to grow, gradually adding the provision of delivery and cataloguing services for area school districts and increasing the number of member libraries, including the (then) Village of Tilley in 2005, the Village of Duchess in 2011, the Irvine library in 2015, and the Gem library in 2016. With the addition of the Gem library in 2016, all libraries located within Shortgrass' geographic area are now fully participating members.

Important Annual Events:

*please see Appendix A, the annual Calendar of Meetings, for actual dates.

January:
- First Library Managers meeting of the year
- Calendar of meetings for the year is distributed by Shortgrass
- The Manager, Systems and Technical Services shares data and annual statistics for the previous calendar year with member libraries. This data must be entered into the
- Complete and submit the survey for the PLSB Survey and Annual Report. Due Date: February 28th.
- Invoices for materials allotment are sent out to library boards.
- Invoices for operational levies are sent out to municipalities.

February:
- Feb 28th: Survey & Annual Report for provincial grant funding from Public Library Services Branch (the same one sent to you in January) is due. For more information, please see: http://www.municipalaffairs.alberta.ca/plsb_survey_and_annual_report.cfm
- Libraries are asked to indicate whether they are participating in the TD Summer Reading Club

March:
- Library Managers meeting
- Summer Reading Program Planning - Parades.
  - Please inform Shortgrass about parades happening in your community this summer if you would like to arrange our participation
- Southern Alberta Library Conference (SALC) in Lethbridge
- Libraries are asked to select their preferred date (in July or August) for the summer reading concert tour, which will be organized and funded by Shortgrass

April:
- Alberta Library Conference in Jasper

May:
- Library Managers meeting

June:
- Middle of June: joint meeting with Shortgrass Library Board, Library Managers and Library Board Chairs.

July & August:
- Summer Reading Program takes place
- Summer Reading concert tour of member libraries by a children's performer

September:
- Library Managers meeting
- Submit summer reading statistics to Client Services Librarian

November:
- Library Managers meeting
- Late November - Order cut-off date

December:
- Annual Christmas Dinner & Social
- Shortgrass office Christmas closure: 12 p.m. on December 24 to January 1

Shortgrass services offered to member libraries:

The following is a brief overview of Shortgrass services offered to member libraries. Further information about these services can be found in other sections of this manual.

Bibliographic Services & Acquisitions:

The Shortgrass Library System provides an annual per capita allotment to member libraries which is to be used for the purchase of library materials. The rate for the per capita allotment is reviewed and set by the Shortgrass Library System on an annual basis and takes into consideration materials pricing trends provided by major vendors, as well as other factors.

Member libraries are responsible for the selection of materials for their collections. Shortgrass staff members are responsible for placing the orders, and cataloging and processing the materials before shipping them to the owning libraries.

OverDrive Collection Development

Shortgrass Library staff purchase eBooks and eAudiobooks for the LibraryToGo collection based on the amount of money allocated to the OverDrive system-wide eBook collection development. Library Managers vote on the amount allocated for these purchases each year. The OverDrive purchases are done on a weekly schedule and are based on the list of the most popular titles in the Amazon Kindle and Kobo catalogues.

Only eBooks are purchased with the Overdrive allotment; member libraries are encouraged to buy eAudiobooks based on their local demand. eBook and eAudiobook titles bought by an individual library or based on an individual library requests are paid for out of the library's own materials budget.

Shortgrass is also responsible for loading the catalogue records for all new titles purchased for the LibraryToGo collection and ensuring the optimal display of the OverDrive titles in the online catalogue.

Consulting by Professional Librarians:

To achieve excellence in library service, support is offered to local boards, staff, and volunteers including:
- Onsite and remote support, training workshops,and seminars
- Plan of service and policy development facilitation
- Library programming support

- ○ Programming kits
- ○ Library advocacy & marketing assistance
- ○ Summer Reading Program support
- ○ Assistance with collection development and space planning

Technology:
- Symphony Integrated Library System (ILS)
- Bibliocommons - an easy to use, public-facing tool for catalogue searching, including mobile access via apps and mobile web
- Computer and Information Technology support services
- Library Website development and maintenance

Other Benefits:
- Access to a breadth of eResources and digital content
- Intra-system van delivery service
- Resource sharing at a provincial and national scale
- Reference services

Resource sharing and Interlibrary loan services

- A shared online catalogue and software allows libraries to manage patron records, circulate items, and more
- Interlibrary loan of requested titles from libraries across Alberta and Canada
- Ability to borrow items/access services with a Shortgrass library card from 14 public libraries
- Reciprocal borrowing with Medicine Hat College Library

Computer and information technology support services

Shortgrass manages computer and network resources throughout the region, providing:
- SuperNet, Internet, and wireless services
- Computer and network support via remote desktop, on-site visits, and emergency after-hours support
- Email and Library website development and hosting
- Computer purchasing and network-related hardware and software for libraries
- Configure system wide searching via Bibliocommons - an Online Public Access Catalog (OPAC), including mobile access via apps and mobile web

Please see Appendix B, Policy F.10 (Technology Software/Equipment Support -- Service and Financial Support) for full details of Shortgrass' computer and network management commitments.

Disc cleaning and repair services

Shortgrass offers a disc repair service to its member libraries. This service is provided through a Disc Cleaner that can repair most scratches on 12 cm disks including Music CDs, Books on CD, DVDs and CD-ROMs, Video game discs and Blu-Ray discs. Please fill out the Disc Repair Form for each disc you send in to be "cleaned".

The disc cleaning/repair service is also available to the public at a cost of $1/disc for library card holders and $2/disk for those who do not have a library card. Patrons can send discs they wish to be cleaned/repaired through their local library.

Library 2 You

Library 2 U is a free mail service delivering print and audiovisual material to patrons facing physical and geographic barriers to accessing their local library. This service is offered in partnership with Marigold Library System. More information can be found in the Services for Homebound Patrons section of this manual.

Meeting Room Rentals

Shortgrass has two boardrooms available for use by SLS member municipalities and member library boards/staff. Both rooms are equipped with a projector and screen. Washroom access is available.

The Shortgrass Library System Board of Trustees views its two boardrooms as a valuable regional community resource. The Board's Bylaw states that the boardrooms are available for use by member libraries at no charge during business hours. Coffee service is available at an additional fee.

For meeting room bookings, please contact the Executive Assistant.

APPENDIX A

Shortgrass Library System 2019 CALENDAR OF MEETINGS	
Date	**Meeting**
January 2	1st day SLS office open in 2019
January 14	Library Managers meeting
January 16	**SLS Board Meeting**
February 13	**SLS Board Meeting**
February 18	Family Day – SLS Office Closed
March 18	Library Managers meeting
March 20	**SLS Board Meeting**
April 17	**SLS Board Meeting**
April 19	Good Friday – SLS Office closed
April 22	Easter Monday – SLS Office closed
May 13	Library Managers meeting
May 15	**SLS Board Meeting**
May 20	Victoria Day - SLS Office Closed
June 19	**Board Meeting** w/ Lib Board Chairs & Library Managers
July 1	Canada Day – SLS Office Closed
August 5	Heritage Day - SLS Office Closed
August 21	**SLS Board Meeting**
September 2	Labour Day - SLS Office Closed
September 16	Library Managers meeting (location TBD)
September 18	**SLS Board Meeting (location TBD)**
October 14	Thanksgiving – SLS Office Closed
October 16	**SLS Board Meeting**
October 21	PD Day
November 11	Remembrance Day – SLS Office Closed
November 18	Library Managers meeting
November 20	**SLS Board meeting**
November 22	**Order cut-off**
December 11	Christmas Dinner & Social (Medicine Hat Golf & Country Club)
December 24	Christmas Eve - SLS Office Closed at noon until January 2nd.
January 2, 2020	SLS Office reopens
	Last Updated: August 8th, 2019 pm

APPENDIX B

SHORTGRASS LIBRARY SYSTEM POLICY MANUAL

Section F: Finance

Policy F.10: Technology Software/Equipment Support – Service & Financial Support

Updated and Approved: February 19, 2014
Updated and Approved: May 17, 2017

Background

The Shortgrass Library System and its member libraries share in the <u>service support</u> of the telecommunications system and the Integrated Library System (ILS) software and equipment. This policy and accompanying guidelines detail the responsibilities of SLS and the individual libraries as well as details about the cost sharing arrangements.

Policy

The Shortgrass Library System will ensure that each member library receives full maintenance support to enable public access to the SLS Online Resources. SLS will also ensure library staff have relevant access to the ILS client software to enable them to perform their duties.

The telecommunications costs relating to the public access, circulation, and communication functions plus the maintenance of the ILS are shared by Shortgrass Library System and the libraries on a 50/50 basis.

Guidelines – Service Support

These guidelines outline the service support expectations for technology equipment used by SLS and its member libraries.

A.   Supporting Computer Equipment and Setup at Shortgrass Member Libraries

1.   Libraries may purchase additional equipment. SLS strongly encourages libraries to purchase equipment that matches specifications and standards provided by SLS. SLS will not support any hardware, software, printers, or network devices if libraries purchase equipment not meeting those standards.

2.   When libraries purchase their own computer equipment, they should use consistent computer suppliers who can supply long term hardware support. A consistent operating system version should also be acquired to ease support and troubleshooting.

3.   If outside funding sources become available, SLS may provide assistance in purchasing additional equipment.

4.   Each library is expected to provide a protected environment for technology equipment.

B.   <u>Shortgrass Library System Responsibilities</u>

1.   <u>Hardware Purchase</u>

- Provide hardware specifications to libraries when they are planning purchases of technology equipment
- Provide operating system specifications for staff and public technology equipment
- May purchase additional hardware on behalf of member libraries if funds become available.

2.   <u>Hardware Support</u>

SLS Staff will provide hardware support for the following:
- Circulation and Public Access technology equipment, including Wi-Fi.
- Network equipment (router, hub, phone connections) for CIRC/PAC connections
- Older PCs supplied by SLS that function as PAC.
- System Printers
- Other support for technology hardware maintenance, repairs and installation support may be offered if time and resources permit.

3.   <u>Software Support</u>

SLS Staff will provide software support for the following:

- ILS software maintenance is provided by SLS.

4.   <u>Network Support</u>

SLS Staff will provide network support for the following:

- Support for technology equipment obtained by direct library purchases or grant purchases is limited to solving software and hardware problems to maintain existing network connectivity
- SLS Staff will monitor the network to ensure network health.

5.   <u>Internet Connectivity</u>

SLS Staff will provide support to ensure internet connectivity as follows:

- Assist with the technology setup involved with firewall and hub setup as well as the network settings on technology equipment.

- Internet connectivity charges are shared by SLS and member libraries.
- Monitor network usage and allocate bandwidth to optimally suit local needs

C.   **Member Libraries Responsibilities**

1.   Member libraries are strongly encouraged to train their staff to support and maintain all technology equipment housed in their library.

2.   Hardware Purchase

- Libraries are responsible for purchasing their own technology hardware. However, SLS has the following recommendations:

  - SLS strongly encourages libraries to purchase equipment that matches specifications and standards provided by SLS.

3.   Hardware Support

SLS Member libraries are responsible for supporting any hardware not mentioned in Section B. 2 of this policy.

- Libraries should work with the original supplier of any equipment not supported by SLS.
- For any equipment not supported by SLS, staff will assist member libraries in finding appropriate help.

4.   Software Support

SLS Member libraries are responsible for supporting any software not mentioned in Section B. 3 of this policy.

- Library purchased software is the responsibility of the library
- SLS Staff provide training in the use of ILS software.
- For any software not supported by SLS, staff will assist member libraries in finding appropriate help.

5.   Network Support

SLS Member libraries are responsible for supporting any network issues not mentioned in Section B. 4 of this policy.

- Network cabling within the library is the responsibility of the library
- Libraries should follow general equipment guidelines provided by SLS Staff when dealing with network equipment.

6.   <u>Internet Support</u>

- Libraries may be required to purchase a firewall device or a hub if an additional internet feed is purchased for the library (the Library is expected to contact SLS and allow SLS to participate in the equipment setup)
- SLS will only support technology equipment that has been approved by SLS Staff

Guidelines – Cost Sharing

The calculations for cost sharing are conducted as per Appendix A to this policy.

1. **Telecommunications - Cost Sharing Formula**

- The telecommunications annual cost will be reduced by the amount charged to contracts before the 50/50 cost sharing formula is applied (SLS 50% and Member libraries 50%)
- Billing dates for the period of January to June will be July 15th and for the period of July to December will be December 15th.

2. **ILS Maintenance - Cost Sharing Formula**

- The ILS maintenance annual cost will be reduced by the amount charged to contracts before the 50/50 cost sharing formula is applied (SLS 50% and Member libraries 50%)
- SLS will bill the libraries July 1st for annual ILS maintenance.
- As per the Shortgrass agreement, the population figures most recently published by Alberta Municipal Affairs will be used to calculate per capita costs.

2. SLS -- % Breakdown for Member Libraries 3. Use when Preparing Sales Invoices for Member Libraries base on share 4. Last Updated: March 27, 2018 based on 2017 Official Population Count			Percentage Doubled
Alcoma Library Population: 691	Division #4 (Population 691 – 100%) = 0.32%	Total: 0.32%	**0.64%**
Bassano Library Population: 1,752	Bassano (Population 1,206 – 100%) = 0.56% Division #6 (Population 546 – 100%) = 0.25%	Total: 0.81%	**1.63%**
Bow Island Library Population: 3,833.50	Bow Island (Population 2,043 – 100%) = 0.95% C of 40 Mile (Population 50% of 3,581 – 1,790.50) = 0.83%	Total: 1.79%	**3.57%**
Brooks Library Population: 16,835	Brooks (Population 14,451 – 100%) = 6.73% Division #5 (Population 1,324—100%) = 0.62% Division #10 (Population 1,060 – 100%) = 0.49%	Total: 7.84%	**15.68%**
Duchess Library Population: 2,461	Duchess (Population 1,085 – 100%) = 0.51% Division #3 (Population 547 – 100%) = 0.25% Division #8 (Population 829 – 100%) = 0.39%	Total: 1.15%	**2.29%**
Foremost Library Population: 2,331.50	Foremost (Population 541 – 100%) = 0.25% C of 40 Mile (Population 50% of 3,581 – 1,790.50) = 0.83%	Total: 1.09%	**2.17%**
Gem Library Population: 568	Division #9 (Population 568 – 100%) = 0.26%	Total: 0.26%	**0.53%**
Graham (Ralston) Library Population: 2,735.39	Cypress County (Pop. share – 26% of 6,657.98 – 1,731.07) = 0.81% CFB Suffield (Pop. share – 1,004.02) = 0.47%	Total: 1.27%	**2.55%**
Irvine Library Population: 1,464.76	Cypress County (Pop. share – 22% of 6,657.98 – 1,464.76) = 0.68%	Total: 0.68%	**1.36%**
Medicine Hat Library Population: 66,122.93	Medicine Hat (Population 63,260 – 100%) = 29.46% Cypress County (Pop. share – 43% of 6,657.98 – 2,862.93) = 1.33%	Total: 30.8%	**61.60%**
Redcliff Library Population: 6,199.22	Redcliff (Population 5,600 – 100%) = 2.61% Cypress County (Pop. share – 9% of 6,657.98 – 599.22) = .28%	Total: 2.89%	**5.77%**
Rolling Hills Library Population: 577	Division #1 (Population 577 – 100%) = 0.27%	Total: 0.27%	**0.54%**
Rosemary Library Population: 758	Rosemary (Population 396 – 100%) = 0.18% Division #7 (Population 362 – 100%) = 0.17%	Total: 0.35%	**0.71%**
Tilley Library Population: 1,020	Division #2 (Population 1,020 – 100%) = 0.48%	Total: 0.48%	**0.95%**
Total Population: 107,349	50% Mem Lib + 50% SLS = 100%	Total 50% for member libraries	**100%**

*Rounded to 2 decimal places