

Latah County Library District

LSTA Grant Peer Evaluation, Fall, 2008 705353-00

Evaluation Summary

I visited the Latah County Library District (LCLD) during the first week of September, 2008, to talk with staff members and others about the process and results of an LSTA grant they had received in 2005. This grant was to support LCLD in expanding their offerings for patrons and upgrading their catalog through joining the VALNet consortium and migrating the LCLD bibliographic records to the VALNet catalog. This grant was completed in the spring of 2006, with some delay in the original timeline, but also without using the entire estimated dollar amount granted for the project. The objectives stated in the grant application were met, there was strong support from both staff and the library board for the changes made, and there was good communication on the part of the LCLD to educate library patrons. Staff have found some changes to be difficult or confusing, but efforts are being made on the part of all of the staff to understand and adapt to new processes. A definite benefit is seen to the expanded database of library holdings and the independence that is offered to the library patrons with the availability of the consortium to borrow from. Staff were positive overall about the success of this project, and felt that it had been a good step forward for LCLD.

Project Objectives

There were two objectives for this project. The first one was to join the WIN consortium, to increase the potential for resource sharing in the northern Idaho region that Latah County is a part of. A second objective, as a requirement to becoming part of VALNet, was to migrate the existing Latah County Library District (LCLD) library catalog to the Voyager system used by VALNet. This project gave LCLD the opportunity to broaden the database of available library materials for their patrons, and at the same time to do a thorough weeding and cleaning up of their current library collections and online catalog, in preparation for the migration to VALNet's catalog.

Project Method

Initially, in the exploration phase of this project, LCLD was investigating merging their catalog with the Voyager system used by the CIN/WIN consortium. Staff members from LCLD met with staff from a branch in the Coeur'de Alene area for education about

input into their system. Some basic methods differences were found in the way cataloging records were added to the CIN catalog vs. current practices at LCLD. Because these differences were seen as a philosophical difference in approaches to cataloging, LCLD determined that their cataloging practices were not going to be compatible with those done by CIN. This discovery necessitated a slight change in direction for the district. Because VALNet is based in the Lewiston area and many of the libraries south of Latah County were already members, the LCLD looked that direction as their next step. After investigating options available with VALNet, LCLD determined that they could join VALNet as the way to become part of WIN, and that the cataloging practices used in the VALNet system were very comparable to those already in place at LCLD. A previous interlibrary loan framework already existed between LCLD and VALNet, but this change in participation would create an internal, rather than external, borrowing pathway for the patrons of LCLD as VALNet members.

As a way to get started with this project while final details were still being decided on, the LCLD aggressively began weeding their collection in hopeful preparation of future catalog migration. Planning for this project provided an incentive to do a thorough weeding and catalog clean-up throughout the LCLD 7-branch system. It was anticipated that there would be a high match rate with VALNet records already in their system, but that there would also be some brief LCLD records that would have to be dealt with manually.

In addition to the bibliographic merge into the VALNet database, some other related services would need to be set up. As a part of the migration, the LCLD patrons would need to be entered into the VALNet integrated library system. The patron database would be especially useful when universal borrowing was fully set up in the WIN consortium, providing direct patron access to borrowing materials from other WIN libraries. Initial plans were that this patron database would be able to be migrated directly from the old system to the new one, but this did not turn out to work when the time came. Instead, the patron database was re-created from scratch, using up considerably more staff and volunteer time than had been anticipated. Another service added was the VALNet courier, who would add the Moscow location of LCLD to the VALNet weekday courier run. The courier stop 5 days each week in Moscow would

enable fairly quick and easy exchange of library materials to and from the LCLD branches and the rest of the VALNet system.

The LCLD relied primarily on its own staff and volunteer resources for the completion of the work in this grant process. The technical services department was responsible for the work needed to clean up the database and remove all weeded items. The various staff members responsible for district-wide purchasing in adult, young adult and children's divisions of the library system were active in the weeding of both print and non-print library materials. This provided an opportunity to clear out older formats as well as worn items and update the look of the collection with more current non-book options.

The timeline for this project showed that LCLD started working on the information and training needed even before the grant was approved. Their dedication to this project and conviction that this was a necessary part of moving forward as a growing and active library district was apparent as information gathering, weeding and staff training took place during the time between submitting their grant application in the fall of 2004 and receiving notice of the approval of the grant in the spring of 2005. A contract was signed with Endeavor to manage the data migration as soon as the grant was approved and training on the need skills was quickly planned. However, due to some communication glitches with the Endeavor staff in the Midwest and the high amount of learning that was needed on the part of the LCLD staff, the necessary training did not take place until several months after the planned timeline. This delay then slowed down all the subsequent activity in the timeline, pushing full implementation of the project back by about 6 months. However, the LCLD staff was able to use this delay to their advantage, as it created more time for the learning that needed to take place and for continued weeding and cleaning up of the existing library database. The flexibility that was allowed by the Idaho Commission for Libraries (ICFL) in adjusting the timeline needed was very helpful to the LCLD in the successful completion of this project. The budget for this project was split primarily between fees for initially joining the consortium, for data migration and software updates, and for the staff hired to help with the weeding and database cleaning-up that was needed before catalog migration could take place. Some adjustments were made to the details of how these expenses broke out

during the course of the grant. Changes were needed to cover the cost of de-duplication of catalog records, which was not expected when joining WIN but was required before adding the records to VALNet. New borrower cards were needed for the LCLD patrons to be members of VALNet, which was another unanticipated expense. The additional VALNet joining and yearly membership fees also had to be added to the overall total for the grant. These expenses had been overlooked in the course of switching the grant plan from WIN to VALNet. However, other areas of anticipated expenses came in under budget, so the overall grant award covered the needed costs. LCLD actually did not use the entire grant award amount in their final tally, and does not seem to have skimped anywhere or neglected any part of the process to create this savings.

Project Results

This project met all of their objectives as stated in the original grant proposal. There were three stated objectives: for the public interface to the new Voyager system to be up and running, for all of the LCLD bibliographic records to be added to the VALNet database, and for all of the LCLD staff to be trained sufficiently to effectively use the Voyager system. Each objective involved considerable research, planning, and staff investment of support and time. At the completion of the project in 2006, all of these objectives had been done to the satisfaction of the LCLD staff. The weeding that had been done for much of the previous year made the migration of bibliographic records somewhat less problematic than it might have been, though as is usual with any transfer of cataloging data, there were several areas that didn't go as smoothly as were hoped. However, support from the other members of VALNet helped with some of this transition and some of the problems were worked out internally by the LCLD staff. The expansion of the catalog offerings, and the additional options available to patrons from their own computers or without needing LCLD staff intervention, have been very popular with LCLD patrons. The recent addition of universal borrowing options within WIN and outside of the VALNet system have opened up even more materials to patrons and provided additional educational opportunities for the LCLD staff. The emphasis of the LCLD has moved from a system where the staff are a part of every library transaction towards a patron-based responsibility and independence that seems to fit well with the attitude many people have today towards online information access and provision. The

library has retained many well planned activities that invite patrons into the library buildings while at the same time acknowledging that many people will prefer to control the balance of online vs. in-person use of the facility as much as possible. This emphasis on patron control likely would have happened as a part of the change in expectations and roles of public libraries as a whole, but the process was encouraged and sped up as a part of this grant project.

In the future, it can be expected that additional adjustments within the VALNet group will continue to improve the options and processes that are a part of membership in a large cooperative library consortium. At the time that LCLD was implementing this migration project, VALNet was going through some growing pains due to an internal organizational change. The consortium focus is changing to reflect more public library and small school participation, which is changing the needs of the members of the group. Because the LCLD was very large, in comparison to most of the membership of VALNet, and because they were a multi-library system, there were some unanticipated questions on both sides, but the current attitude of the LCLD staff and patrons indicates that continued improvement in the consortium will be welcome and well utilized.

Project Impact

The long-term impact of this project should be considerable. Already the patrons in the LCLD are enthusiastic about the expansion of options in the library catalog and the ease of obtaining materials from other locations. Currently, the LCLD has an exchange of around 200 items daily when the VALNet courier comes to the Moscow branch. The increase in options in the library catalog has also made for more materials being transferred within the LCLD branches. Currently an internal courier runs twice a week, delivering and picking up materials for both transfers between LCLD branches and delivery to and from other VALNet libraries. In spite of the additional offerings of online resources, including e-books in various formats, there still seems to be a steady and potentially increasing, demand for in-hand library materials from the patrons of LCLD. In addition, as one of the largest entities in VALNet, LCLD anticipates an increasing demand on their materials from other libraries in the group. This exchange was an area of concern at the start of this grant, but the feared drain on resources by other libraries in

the VALNet group has not materialized. At this point, the exchange of library items seems to be more evenly balanced than was expected.

An ongoing concern for the future will be the costs of continuing this membership. The benefits are very well seen from the point of view of the patron, but increased costs in sharing resources is a wide-spread concern of many library consortia and VALNet is no different from the rest. Maintenance costs of databases, training expenses and increased transportation costs will undoubtedly bring increases in membership fees and will perhaps also affect the balance of work for staff in participating libraries. These concerns were mentioned by LCLD management and they are very aware of the possible effects of these issues on the long-term outcome of this project.

Project in Retrospect—Project Director and Staff perspectives

The LCLD has, for the most part, embraced without much conflict the process of joining VALNet and migrating their catalog to the VALNet system. Many positive outcomes are seen for the patrons and from the staff point of view. The Project Director for this grant no longer is working at LCLD, but the Access Services Manager from the grant process has since been promoted to Library Director and was very involved in the grant so could comment well from the perspective of project oversight. Her comments were mostly positive, seeing the migration and consortium membership as a part of needed growth for LCLD. Some benefits were basic, such as forcing needed weeding and the clean-up of both the bibliographic and patron databases. The staff appreciates all the support they receive from additional contact with other librarians in the consortium, with a variety of knowledge and interests. The fact that the LCLD doesn't have to do server maintenance and some of the housekeeping chores that come with managing an integrated library system has been a plus, as have the extra opportunities and help with training when needed.

With the completion of this project, changes had to be made to the duties and hours of some staff members to adjust to the new demands made by participation in the consortium. Internal courier needs have increased with the higher volume of materials both coming from the branches to other libraries in VALNet, and coming from outside LCLD to the various branches. The management at LCLD has used this to their benefit by hiring an outside courier to make the deliveries and pick-ups once a week, and using

one of their own staff members to cover the route one other day each week. Having a staff member do the courier run opens up a good opportunity for internal communication and training as needed, without pulling staff from the branches to the main library. In addition to the need for more internal courier runs each week, the time needed to make the circuit of all the branches has increased. It now can take an hour to load and sort or unload and sort materials at the start and finish of the courier run, and the increase of materials delivered to each location adds time to each stop. Staff in each of the branches also find that they use more time than they used to in pulling materials from the shelves for courier pick-up and in re-shelving returned materials. Adjustments have also been made for the circulation staff, as they found themselves doing more computer education as the transition to the new catalog took place, but have needed less time to help place requests for materials from other libraries. Another new feature of this new system was the option of having email notification for patrons of any holds and overdues. These notices are now generated automatically by the computer for patrons with email addresses, freeing staff to cover other tasks.

On the minus side, many of these benefits come with a corresponding feeling of lack of control for some processes, and there are still some concerns about the courier service, including both the VALNet and internal schedules. LCLD is still working on figuring out their place in the consortium, learning how to contribute their input and balance their questions and ideas against their status as a newcomer, and discovering how to both adapt to existing procedures and help make changes that might be needed to continue to improve both the services of LCLD and those of VALNet as a whole. One example of an area that has created some confusion for LCLD and that came up several times in the course of this review was the handling of fines for overdues. Some libraries in the consortium charge fines and some don't, the amounts are different, the time restrictions are different, and each library is to track the various fines, collect them, and then send them to the loaning library in question. This is an example of a fairly common library practice that might not transfer well in the expansion of a library consortium, but LCLD staff are hopeful of being able to discuss these areas of confusion at future consortium management meetings.

From the standpoint of the patron, this project has definitely been more of a plus than a minus. The upgrade to the catalog and migration to the VALNet system has opened up a wider variety of materials for all of the patrons in the LCLD to access, either from their local branches or from their home computers. The ability to request items from any library in the VALNet system has primarily been a bonus, though three issues do make this more problematic for patrons than was expected by LCLD staff at the onset of the project. The display of holdings in the patron interface of the library catalog makes it somewhat cumbersome to find the holdings of just a particular branch in LCLD compared to the holdings of the system as a whole, causing some LCLD patrons to request materials from outside LCLD that were actually available internally. A second issue related to use of the catalog is that the borrowing of materials from WIN but outside of the VALNet system must be patron initiated and can only be tracked by the patron. The patron is responsible for tracking the due date and getting materials back to their local branch in time to be shipped by courier back to the WIN library in question, and this creation of two or more possible due date-tracks for the patron to monitor has been confusing for both the library patrons and the staff as they try to explain the process. The third issue that has come up related to patron-initiated requests from other libraries is that many of the participating libraries in VALNet are located in school districts across the region. These libraries generally are not open during the summer months, but patrons may not realize they are requesting materials from a school and are then left hanging, expecting something to arrive by the courier. All of these problems may take a combination of patron education and additional information or changes to the catalog interface to solve, but the LCLD are interested in discussing some of their concerns and ideas within the VALNet framework for improvement and idea exploration. There are still some questions from staff about the public interface to the catalog and the protocols that were set up for the consortium as a whole. Some of the choices that LCLD has inherited as a new member to an existing catalog are different than their preferences from previous catalogs. There is also some confusion about what level of input members can have to ask for changes within the existing catalog. These questions will provide a place for LCLD to develop relationships and participate with other members of the consortium in improving the group as a whole in the future.

The LCLD Board of Trustees has been very supportive of this project from its planning stages, and members of the board continue to feel that this project was a successful one. Several board members volunteered their time to help with the weeding and other tasks needed to get the collection ready for the migration, and many still feel the project is worth the annual expenses to keep it going for the foreseeable future. Board confidence in the library staff is very high, and the board feeling is that staff did an excellent job handling all of the known and unknown requirements of getting through this project. The board and library staff seem to have a very acceptable level of communication and confidence with each other that is reflected in the success of programs at LCLD.

There are still concerns on the part of branch library staff in particular that many of their newer items end up going out to the VALNet system rather than being in-house for the use of their patrons. When a library is very small, as some of these branches are, this can create some very visible holes in their collections. However, the other side of this is that patrons are often able to obtain the same materials from another library in VALNet, so the exchange ends up being a more even one. Many staff members expressed the opinion that when it comes down to it, the really difference is which end of the transaction you are on at any given point in time.

From the collection development perspective, joining VALNet at the merger of the LCLD catalog into the VALNet system has offered several opportunities and challenges. As a large library, in terms of collection size, LCLD is seeing many requests for their materials on a regular basis. This creates a need for multiple copies of popular items, in the hopes that there will be copies available for both internal use by LCLD patrons and to send to outside requestors. The current consortium circulation system doesn't allow priority to be placed on one's own library patrons, so a balance on internal vs. external demand is still to be learned. Collection development still focuses on the needs and interests of the LCLD patrons, but there is a higher awareness of the requests that will come from other VALNet participants on a regular basis.

From the viewpoint of the technical services staff at LCLD, this project had both positive and negative impacts, but has overall been a plus for the LCLD system. The larger number of records in the VALNet database has made it easier to locate cataloging

information for new materials being added to the LCLD collection. This has resulted in a quicker turnover in getting cataloging done and new materials out for use by patrons. Expanded opportunities for training, support and education have also benefited the LCLD's fairly small technical services staff. Frustration with Endeavor and lack of training and communication in the data migration process had a big impact on the technical services staff, as they bore the brunt of figuring out how to get the data across from their existing online catalog into the format needed by Voyager. These problems were not seen as anything connected with VALNet, but were a direct outcome of problems within the Endeavor organization. Some problematic issues were that one of the branches ended up having duplicate barcodes in the VALNet system, so those had to be replaced and some older Follett barcodes don't seem to work in the new system. Some of these barcodes are being replaced as materials are being checked out, and some of the materials are old enough to be removed from the collection, so it is assumed that time will solve most of these concerns.

The LCLD has also tried to make some changes to their website in conjunction with this grant project. In the grant, some mention was made of hoping the web site would be considered an "8th branch" for the library district. Many staff members indicated that they think traffic on the web site is increasing, and people learn to go there for links to the catalog and information about programs and new options for the district. There was also concern, though, about the difference in populations between those in the Moscow area who are more likely to be interested in computer use and access, and those in the rural areas of the county who tend to prefer in-person contact. The concept of the web site as another branch for the system is more an interesting idea to explore than a current reality in the LCLD, but the fact that this concept is being discussed and awareness of the importance of the web site has perhaps been raised in the minds of all staff, could be seen as a benefit of the grant.

Overall, this grant project can be considered to have been a success, to have accomplished its goals, and is highly regarded by library patrons, staff and the library board. There were obstacles that were overcome, starting with confusion about which path for joining WIN would work best for LCLD. But overall, once decisions were made, the project was managed well, unanticipated problems were dealt with responsibly,

and the staff has followed through with support for the changes and with optimistic views that their concerns and questions will be addressed as LCLD finds its place in the VALNet structure.

Throughout the process of planning and implementing this grant, the LCLD drew on the resources of the (ICFL) in many areas. Staff at ICFL were seen as very helpful in the planning stages, as the initial request to join WIN was adapted to a request to join VALNet. Though ICFL staff were not officially a part of the project team during the course of the grant, the staff at ICFL were perceived as being readily available for consultation and advice if it was needed. The library director at LCLD indicated that, while the grant process did not always go as planned or particularly smoothly, she felt support from ICFL had been very reliable and that the areas that caused concern were able to be dealt with in a reasonable way.

There are several reasons that this grant was overall a success for the LCLD. Initial planning seems to have been well done, and the district staff weren't afraid to express concerns and look for other options when their first plans did not turn out as expected. The adjustment to move to membership in VALNet as opposed to the original plans of joining WIN was done because the staff felt there would be a better fit for the library district in the VALNet group. That being said, any combination of libraries will have differences and adjustments to make on the part of all members, and some of those adjustments were not anticipated by the LCLD. Perhaps some of the details of working with VALNet were not researched as carefully as the change in plans was made, due to time constraints or lack of knowledge on the part of LCLD. Not having been a member of a group such as this consortium before meant that LCLD did not always know what they might need to ask about. And the addition of an established library district to VALNet was also a first, so there was some degree of unknown on the part of VALNet administration, too. However, it appears that both sides of this transaction have done a fairly good job of communicating and trying to work with each other. There are some growing pains in VALNet that LCLD may end up accelerating—issues such as how decisions are made in various areas, and how to shake up a perception that 'we have always done it this way' when change may need to be considered. LCLD also has had some growing pains as it learns to work more closely with libraries outside its own

district branches. The relationship in VALNet is closer than an interlibrary loan sharing agreement, but more distant than branches under the same governance, which makes for many different views and practices that need to sit side-by-side in cooperation. But both LCLD and VALNet seem to be heading towards a good relationship and many benefits for both patrons and staff can be anticipated from this migration project.

The LCLD also has done a good job of communicating within their own district to library board members and patrons. The LCLD Library Board was a strong supporter of the project and some of the volunteer help in the weeding project came from the library board. Regular communication was done between the staff in the Moscow branch, where much of the work took place, and the staff in the other branches in the system, to request help, educate about new processes, and touch bases on how things were going. Many efforts were made to communicate with library patrons about changes that were coming and benefits of the new system. Patrons who are enthusiastic about the computer seem to have embraced the new features and options available and are using the resources opened up to them in the VALNet system. As with many public libraries, LCLD is split between patrons who enjoy computer options, and those who are more traditional and want a person to help them. The staff at LCLD have done a good job of serving both of these groups with the enhancements this project brought.

Respectfully submitted, November 21, 2008

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