

EVALUATION SUMMARY - LIBRI SYSTEM

PEER EVALUATOR: MYRNA WEIKAL, LIBRARY DIRECTOR
MIDVALE COMMUNITY LIBRARY

Grants: T08351-00 Burley Public Library
T08361-00 Jerome Public Library

I was entrusted to perform an LSTA grant peer evaluation of the LIBRI projects, T08361-00 and T08351-00. The project, the formation of a consortium of the public libraries of Jerome, Burley and Rupert, Idaho and concomitant shared integrated library system, was completed in September 2009.

- Overall, everyone, without exception, is pleased with the outcome and feels that in spite of a few delays, the project was well worth the effort and has delivered more than expected.
- Professionalism among the staff increased as a result of the project.
- The project has produced great benefits for patrons and the cities.
- In retrospect, it would have gone more smoothly if two individuals from each library had been dedicated to the project.
- At this point in time the majority of the bugs and glitches in the ILS have been worked out. Library staff are now able to concentrate on understanding and using the system more fully.
- The directors meet frequently to attend to Consortium business. Specific policy issues that would impact the addition of new libraries need to be addressed.
- The Library Directors offer a few suggestions for libraries that may be interested in attempting a similar project. The librarians are eager to share their knowledge and experience with anyone who asks.

To complete the evaluation I offer a couple of thoughts for Laura, Julie and Sharon to consider.

Evaluation – LIBRI System

I based my interview outline on the LSTA Peer Evaluation Specifications for the Evaluation Report. Most of the questions were asked of the Library Directors, Laura Burnett, Julie Woodford and Sharon Kimber. Brief interviews with cataloging and circulation staff were also conducted, and their answers are included. The answers are indicated below the question. Where their answers differed, use the key: J for Jerome, B for Burley and D for DeMary.

1 Project objectives

A. What was the impetus behind this project

J The library needed a better, more robust circulation system. We also wanted online public access to our catalog (OPAC)

B Our current system had reached the end of its useful life. We'd been investigating options since 1998. DeMary qualified for an LSTA grant to automate, the LIBRI collaboration also qualified for LSTA. The board was ready to move ahead. Then Symphony (Sirsi-Dynix product) became available, so it was time to move ahead.

D We knew that our collection was too large for a card catalog. We knew we wanted to formalize the relationship we already had with Burley library.

B. What did you hope the outcome to be

J We hoped to join LIBRI, and to bring Jerome public school libraries into LIBRI as well.

B We hoped for something fresh and new, something right for our communities. We wanted to take advantage of opportunities.

D Automation, a connection, and shared resources.

2 Methods used

A. Timeline and project plan

The timeline was largely set by the vendor, and at one point the project was delayed for five months while vendor-related issues were resolved. Other delays inevitably occurred. Still, the timeline was helpful in giving all parties a means of tracking progress and preparing for the next phase.

B. Resources employed in the plan

Two individuals from each library were assigned to research and formulate the plan: the director and either a cataloger or a systems administrator. A great deal was learned by consulting with existing consortia. The team went statewide to investigate the systems used by other libraries. Documents of LiLI Express and the Library Consortium of Eastern Idaho were referenced in making policy decisions, and the vendor also helped customize policies within the

system specific to the libraries' needs. Library staff were pressed into performing needs analyses, determining reporting, cataloging, circulation and OPAC requirements. Project Mutual Telephone (PMT) offered invaluable assistance with bandwidth infrastructure issues. Idaho Commission for Libraries was peppered with questions.
D We brought in temporary employees and volunteers to get us through the cataloging phase.

3 Results

A. What was the actual outcome, as compared to hopes

Overall, the outcome exceeded expectations.

J School libraries did not join the project, which was a disappointment. We lost some control as a result of being a part of the consortium, and it takes more time to reach consensus.

B. How do results compare to original objectives

All objectives were met

C. How well did results follow the timeline/plan

There were unavoidable delays. It was frustrating, but we dealt.

D. Were there any unexpected benefits or disadvantages

J There has been more resource sharing between libraries than expected, yet shipping/postage costs less than expected. A disadvantage is that if a catalog record is wrong, it is wrong for three libraries. On the other hand, staff catalogers are better trained now.

B We discovered the miracle of working together, meshing our strengths and weaknesses, forming a deep respect for each other. The city and patrons are getting more for their money than ever before. Procedural problems have arisen as a result of cataloging differences.

D Some of our patrons do not like the loss of the date-due slip

E. What future results are expected

J, B Symphony is evolving and Sirsi Dynix is responsive to customer needs, so updates are a regular occurrence. We aren't yet using the self-check option, and keep finding out things we didn't realize we could do.

D We look forward to future consortium collaboration, for example the "Transforming Life after 50" project.

4 Impact

A. What difference has the project made to your patrons

J We are able to offer more resources to patrons. They love OPAC, love the improvement in services.

B We are seeing an increase in library use, whether due to the economy or to LIBRI, who can tell? Symphony (and common LIBRI consortium policy) defines and regulates rules, fees, fines, etc. for patrons. Unless a director allows an override, all patrons are treated alike.

D Children are using OPAC! All patron feedback has been positive (except regarding the date-due cards)

B. What has the impact been on the three libraries, collectively

J We are working like a family now. There is trust; give and take.

B The project lifted us into the next plane, and has laid in good structure and policies for growth and allows us to be ready for the next thing.

D Collection development is coordinated. Our collections complement each other.

C. How was the staff impacted

J Staff show increased professionalism, strong teamwork mentality and a desire to collaborate with the staff of other libraries.

B Some were not willing to make the adjustment, but most rose to the challenge. The hierarchy imposed by Symphony has helped to define and clarify responsibilities.

D The impact was huge, going from card catalog to ILS. Our library has a history of high staff turnover. Newer employers are more computer savvy.

D. What did you learn as a result of the project process

J I learned to rely on my staff. The project was too large for one person. I learned to trust, to delegate critical elements. Library staff exceeded expectations. The process of "going live" went well because the staff was ready.

J, D The time we spent in training before going live was not as effective as after go-live.

B I learned a lot about the 501(c)3 process, consortium governance, policies, legal aspects, cataloging. Also patience and respect.

E. What long-term impact is anticipated

J, B Changes in technology. Will we have funding for the hardware and IT personnel as needed? Someone needs to keep track of changes to the industry. Because of our time investment, we want to stick with this ILS, but what market-driven changes might be coming?

5 Project in retrospect

A. What worked well for this project, what did not

J Vendor's implementation plan was well organized and included group face to face discussion. The staff was dedicated and committed, made the project a priority. Normal operations suffered, such as teen programming, summer reading, budget process, grant writing.

B Food helped get people together. Face to face meetings, conference calls - communication was good. The vendor training was good, but the 30-day training window was too short. The training coupon offered unlimited training once the contract was signed to 30 days after the go-live date. I think that was something like 120 days before and 30 days after. I understand that now the vendor offers a different type training coupon that goes beyond the 30 days after. From our perspective, I'm glad that we had so much training beforehand as it gave us an overview of what to expect, but it was the 30 days after the go-live date when we could actually use the training immediately that was most effective. The 30 days were too limited. Also, in order to take advantage of the training, it had to be planned as some classes had limited training times offered. At that time, the LIBRI members were expected to each take care of their own staffs. Looking back, we could have sat down at the beginning and highlighted what training would be necessary. I think we'd do a better job reminding each other now about the training opportunities.

We planned to go help DeMary, but didn't. On the other hand, Sharon trained herself and learned the information better.

D Team members worked well together. Sirsi-Dynix communication and their software-as-service are excellent. The vendor training was good. There are now very few books that we cannot track. MARC record transfer did not go smoothly. We should have had a counter at the door to log the increase in the number of library users.

B. What suggestions would Directors/ staff make if repeating this project today

J Vendor could utilize conference calls to walk directors through upcoming phases of the plan, so that staff scheduling could be addressed in advance. Directors would do well to consult a book on policy making.

B Don't let a city act as fiscal agent. Get started on the 501(c)3 process right away. Be prepared to address issues in governance with regards to new members, school libraries vs public libraries, etc.

D Allot plenty of the budget for training after going live. Be prepared to hire extra people. Be ready to go with the flow. Automate now if you aren't already.

C. What would you do exactly the same

J Joining the consortium was exactly right

B It was a good journey

D Most of it went right

D. Did you allow enough time for planning

B Planning? Yes. Sleep? No.

E. Did you need additional resources, more participation, more publicity

J I wish we'd had more time to get Gooding, Wendell, Hansen and other libraries into the consortium. We needed more staff, would have liked to dedicate two people to the project; a work center in a meeting room for coordinated implementation, policy writing, and creating spreadsheets would have been really helpful.

B The money would have been better spent on training than on publicity

D We could have used more money, but we made it work. We encounter some people that still don't know about LIBRI, so more publicity may still be needed.

F. Did ICFL provide adequate assistance throughout the project

J They were very helpful with the grant process, always available when needed.

B Absolutely! Better than anticipated, thanks to Gina and Erin

D Yes. They anticipated our needs.

6 Where things stand

Collection development is more and more a collaborative effort, with libraries working toward complementing each other's holdings.

Staff members are now learning the nuances of the ILS. There are still some cataloging issues to work out. Libraries are utilizing the client care option provided by Sirsi-Dynix, which has been very responsive and helpful.

Consortium members are enjoying the benefits of membership, such as savings realized as a result of cost sharing, and a larger number of available materials for patrons.

The consortium is open-minded about new members, but does not feel quite ready for active recruitment.

The consortium is collaborating on the "Transforming Life After 50" program.

7 Next steps

- All three libraries are about to perform a complete inventory of holdings.
- The consortium's association with CSI is an informal working relationship, but it has potential for a formal partnership. Burley is investigating the construction of a new building near CSI property to house shared library materials.
- Laura suggested the libraries might consider making a You-tube video showing patrons how to use OPAC.

My two cents

I noticed a few areas that could use some attention, once everyone has a chance to catch their breath:

1. Cataloging. There seems to be some concern that cataloging in the three libraries may not be consistent. Staff of all three libraries assigned to cataloging duties might benefit from regularly scheduled face-to-face meetings to get the issues worked out and/or identify additional training needs.

2. Make a Plan. Although a desire to include school libraries and nearby public libraries was expressed, it didn't sound as if LIBRI has included in their strategic plan a timeline for the active recruitment of additional libraries.

3. Define and address the policy issues holding LIBRI back from feeling ready for new members. At some point that door should be opened; an open forum for potential members may bring in valuable insight in the formulation of policies and procedures.