

# V-Cat ILS Evaluation and Review Committee

## Meeting Notes for Thursday, February 9, 2023

This meeting was held remotely via BlueJeans.

### 1. Call to Order

The meeting was called to order at 9:35 a.m. by Committee Chair A. Johnson.

### 2. Roll Call & Introductions

Committee members present: A. Greenhaw (Rhinelander), M. Pregler (Antigo), E. Brewster (Three Lakes), H. O'Hare (Tomahawk), K. Heiting (Granton), M. Handel (Medford) (joined later in the meeting), A. Johnson (MCPL), C. Luebbe (MCPL), R. Metzler (WVLS), K. Zimmermann (WVLS).

Others present: J. Johnson (NWLS), G. Rae (NWLS)

Note: The committee is looking for an additional committee member to fill a vacant seat.

### 3. Approval of Agenda

M. Pregler moved to approve the agenda, seconded by A. Greenhaw. Motion carried.

### 4. Approval of Prior Meeting Minutes

K. Heiting moved to approve prior meeting minutes, seconded by H. O'Hare. Motion carried.

### 5. Evaluate Committee's Responses to Survey II

An overview of the survey results was presented by K. Zimmermann.

There were 11 responses. There were nine responses from V-Cat Committee members and two responses from Northern Waters Library Service staff.

Overall the ratings for Koha were good (90.9%) to excellent (9.1%). The overall ratings for Carl were mostly poor (63.6%). The remaining participants rated Carl as terrible (18.2%) or good (18%). Sierra's overall ratings were mostly good (63.6%). The remaining participants rated Sierra as poor (18.2%) or excellent (18.2%).

When asked to recommend a product for their individual library, 54.5% of survey participants recommended Sierra, and 45.4% of participants recommended Koha.

When asked to recommend a product for the consortia as a whole, 45.5% of respondents selected Sierra, and 54.5% of respondents recommended Koha.

Detailed survey results were presented.

#### The following questions were raised about Koha:

- Can we talk with libraries/consortia that have made the change from Sierra to Koha to see how the admin transition went and if more time is needed to manage Koha as opposed to Sierra?

- Can we talk with consortia using Koha about the levels of customization that are being done, at what levels, and how permissions are managed. How does customization affect training materials?
- Can we review how hold priority is designated to determine which libraries' items fill holds first, and will the system be able to offer similar limitations for local holds? Is there a way to allow patrons to place holds when available copies are limited to local use to be filled at a later date?
- Can we see Koha in action at a library/consortia to get a more detailed on the ground understanding of circulation, reports, inventory, cataloging and acquisitions workflows?

A discussion about Koha raised additional questions about the following:

- How slips are printed for due dates, transits, holdshelf
- How patrons can or cannot be linked
- Other functionality concerns from larger libraries

It was noted that site visits and follow up with vendors could help answer these questions.

The following is a summary of reasons given for the Koha ratings (Good = 10, Excellent = 1)

- It seems to have all of the functions we currently have and so much more
- The forward moving option for V-Cat
- It seems to be a well-developed product with a robust development community
- The Koha culture is interesting
- We have been pleased with Bywater support of Aspen
- Very user friendly and easy to use
- Good circulation and cataloging features
- Seems like it could be an easy transition from Sierra
- The company and product seem flexible & capable
- There is lots of opportunity for customization
- It had a lot of good features
- Multiple ways to do things
- Inventory looked good, but hard to tell in demonstration
- Completely browser based
- Flexible, modern layout
- good integration with Aspen
- Functional
- The demonstrators at ByWater were the most knowledgeable, engaged, and responsive of the three
- Their support documentation seems stellar
- Koha matches or outperforms Sierra in the functions that most staff use most often
- Likely to be easier to train new staff on than Sierra is. I do have
- Some concerns based on staff perspectives of the more niche functions like cataloging and ILL
- The higher quality of Koha's search feature (compared to Sierra's) in particular stands out as an improvement to most work

Additional discussion about Koha it was noted that some of the comments in post demonstration surveys for Koha focused on patron's reactions to the product, however the visible changes to our patrons will be limited as most of the changes would be within the

staff interface. K. Zimmermann noted that the goal would be to keep Aspen to minimize changes to the patron experience.

The following outstanding questions were raised about Carl:

- The confusion between Carl X and Connect - which one would we use?

The following is a summary of reasons given for the Carl ratings (Terrible = 2, Poor = 7, Good = 2):

- It may be a great product in five years, but doesn't seem like the right fit for our libraries now.
- The web interface is still in development, and the desktop client is no longer being improved
- The software's functions being split between two interfaces is a significant and unnecessary barrier for staff to overcome to perform daily functions.
- Lack of confidence in support from the vendor if issues arise.
- CARL did have some useful features, but nowhere near enough to overcome the other issues.
- I really like their passion for their product.
- Concerns about no longer having macros
- Doesn't seem to be as user friendly

Committee members agreed that survey II results seemed to be a decent summary of what was expressed in the post demonstration surveys.

The following questions were raised about Sierra:

- How much time for training and extra cost would be needed to get everything upgrades to what our members want ?
- Can we get Innovative to throw in Mobile Worklists if we renew?
- Why have we not updated and made use of all the flashy features they say aren't exactly new?
- Can we trial Mobile Worklists and/or see it in use at a library/consortium?
- Can we trial Sky River and/or see it in use at a library/consortium?
- What opportunities exist to explore more questions specific to Sierra functionality if V-Cat chooses to stay with Sierra?
- What is involved to have a 'reset' to use features discussed?
- I would like to see how inventory management would work after the demonstration.

The following reasons were given for the Sierra ratings (Poor = 2, Good = 7, Excellent = 2):

- Most staff know how to use the necessary functions and it is familiar.
- It is possible that some changes could be made to improve our experience with Sierra as a product.
- The number of peculiarities that staff have to work around every day is too high.
- Searching is subpar for a modern system, and it relies too much on staff memorizing the values of codes and particular paths to find things
- Current support gives enough confidence to say that the system will continue to function, but not necessarily that our experience with support and additional features will notably improve.
- Flexible, capable, excellent cataloging interface & create lists reporting

- Fast and reliable in general
- It is comfortable, most of us have strong work around in place-
- No need to spend money or time on migration
- Sierra works fine. but their support is abysmal. Their organization continues to frustrate me.
- Concerns about the limited nature of future developments
- Concerns and frustrations with poor support from Innovative
- Frustrations with functions that are not available.
- Creating reports is difficult
- When something is wrong with Sierra it takes a while for it to get the issue fixed and some issues are not fixed

The recommendations were split between Sierra and Koha. When considering individual libraries, participants recommended Sierra (6) and Koha (5).

The following reasons were given in support of Sierra:

- We are all familiar with Sierra
- Less training would be needed than if we migrate to another product
- Sierra is a great product
- We can improve Sierra to better suit us.
- The limited capacity of library staff to collectively support each other through a migration is a concern.
- There may be additional administrative costs for migration and support.
- At this time, it has the best features for our work.

The following reasons were given in support of Koha:

- Koha matches or outperforms Sierra in the functions that most staff use most often
- Training new staff on Koha will likely be easier than training new staff on Sierra
- It had a lot of really great features.
- I like that I can customize my own preferences, but not necessarily mess up things for the system.
- Cost savings compared to Sierra.
- The interface is better than Sierra
- The record options, advanced circ options, notice options, and reports structure of Koha are better

When considering the consortium as a whole, participants recommended Sierra (5) and Koha (6).

The following is a summary of reasons given in support of Sierra:

- Based on the feedback some staff, they would feel comfortable with either Sierra or Koha
- It would be easier and cheaper to stay with Sierra
- It may take 5 years to fully learn the new system
- The capacity of system and library staff to collectively support each other through a migration is uncertain
- Change it is not necessary. We have systems in place that are working
- Unsure about what to recommend - want to hear more about the large library concerns.

- We know Sierra well and can improve it to better suit us.
- At this time, it has the best features for our work.

The following is a summary of reasons given in support of Koha:

- Koha matches or outperforms Sierra in the functions that most staff use most often
- Training new staff on Koha will likely be easier than training new staff on Sierra
- Cost savings
- They seem to have an excellent track record with consortia.
- Koha has many great features.
- User friendly
- Would work well with the Aspen catalog.
- The Koha post demonstration survey received more responses than the other two surveys and 75% of participants would recommend Koha.
- Potential for continued development
- Potential for improved support

The committee discussed the results, and noted concerns about Koha related to challenges of the transition process. It was also noted that Koha seems to have better training available. Discussion about the reporting tools in Koha and Sierra followed, and the committee agreed to gather more information about reporting in Koha.

K. Heiting made a motion to discontinue further investigation of Carl. M. Handel seconded. Motion carried.

K. Zimmermann will communicate with Carl about the decision.

## **6. Hear Input from Other Migrating Systems**

Three library consortia are moving from Sierra to Koha supported by ByWater Solutions. CLAMS in Massachusetts, Ocean State in Rhode Island and Cuyahoga County in Ohio. Ocean State and CLAMS have been very involved in the Innovative User Group (IUG) and K. Zimmermann reached out to them and they agreed to give an update about their migration processes.

Milwaukee County Library System opted to stay with Sierra, and has formed a committee to look at how improvements and changes can make Sierra operate better for them. IFLS is committed to continuing with Sierra, and could continue to be a collaborative resource if we continue to stay with Sierra.

South Central Library System looked at options including Koha supported by ByWater Solutions. They noted that Koha did not have all the necessary features. They decided to stay with LibLime supported by Bibliovation.

Winding Rivers Library System is currently on Sierra, but is considering other products at this time.

J. Johnson noted that Northern Waters Library Service paused their ILS decision making process to focus on the Northern Wisconsin ILS Consortium Exploration (NICE) project.

K. Zimmermann shared that there is merit to considering the NICE project and V-Cat ILS Evaluation and Review timelines. Some of our processes may need to shift.

## **7. Determine Site Visits**

The committee discussed site visit possibilities in Minnesota (Cambridge) and Illinois (western suburbs of Chicago). K. Zimmermann expressed interest in seeing the products in action at a public library consortium. A. Johnson noted that it would be important to see the systems in action. The committee discussed the need for a virtual or in person demonstrations, and it was determined that some of the features would be best in person. Also that some libraries may be more comfortable with in person demonstrations.

For Sierra, the site visits could be more selective for the products of interest: Mobile Worklists, LX Starter.

K. Zimmermann will be in touch with vendors and will reach out to possible libraries to arrange site visits in April.

C. Luebbe will work with K. Zimmermann to review questions from the demonstrations and begin a list of outstanding questions and areas to focus on during site visits. An effort will be made to determine what could be virtual / in person. All committee members are invited to bring a list of things that they'd like to see demonstrated during site visits.

The committee discussed the current timeline and a potential need for updated quotes, which are usually good for 90 days. The consensus was to wait to request updated quotes. It is likely that a recommendation for an ILS change would need to be passed by V-Cat in September 2023 to complete a migration before September of 2024. The NICE project is expected to wrap up in June.

## **8. Request for Future Agenda Items**

Questions for vendors and site visits  
Information about site visits

## **9. Set Next Meeting Date**

Thursday, March 9, 2023.

## **10. Adjournment**

H. O'Hare moved to adjourn, seconded by M. Handel. Motion carried. Meeting adjourned.

K, Heiting and K. Zimmermann, Recorders