

V-Cat ILS Evaluation and Review Committee

Meeting Notes for Wednesday, August 16, 2023

Call to order

The meeting was called to order by Chair A. Johnson (MCPL) called at 10:34 am.

Roll Call

Roll call was taken.

Committee members present : H. O'Hare (Tomahawk), A. Johnson (MCPL), T. Blomberg (Rib Lake), R. Metzler (WVLS), K. Zimmermann (WVLS), A. Greenhaw (Rhineland), M. Pregler (T. B. Scott), C. Luebbe (MCPL) M. Handel (Medford)

Others present: J. Johnson (NWLS)

Committee members absent: K. Heiting (Granton)

Approval of Agenda

H. O'Hare moved to approve the agenda. M. Pregler seconded. Motion carried.

Approval of prior meeting minutes

Three changes were requested in the minutes: a typo of "chair" in the call to order, the addition of M. Handel as present, and the meeting adjournment time was 11:23 am.

A. Johnson moved to approve the minutes with suggested changes. H. O'Hare seconded. Motion carried.

Review of any new information gathered

No information was shared.

Discuss final ILS survey results

The committee started by reviewing the numerical score from the survey results, as updated at the previous meeting. A. Johnson noted that the results are not as close as they were at the start of the previous meeting, but show that there is no clear consensus.

H. O'Hare mentioned that the committee had discussed weighting the categories.

A. Johnson noted that he also considered how to best weigh all these things, and noted that determining how to weight the areas may be time consuming. He suggested that the quickest way to come to a decision may be for each committee member to share why they prefer a particular product.

K. Zimmermann noted that in she estimated some weighted percentages in preparation for the meeting and found that the resulting numbers were not any more conclusive than the current numerical score with non-weighted survey results.

A round robin discussion occurred that allowed each committee member to share a product preference and their reasoning for the preference.

K. Zimmermann shared K. Heiting's thoughts, as emailed prior to the meeting: "I would recommend that V-Cat council migrate to Koha as our ILS. There are many features that will be very helpful at the school level and my library as a whole. The costs came in lower than I was expecting. I have gotten a strong customer feeling from the Bywater team. I think it is exciting to move forward with a new company and system. Sierra is fine, but I have really liked exploring the different products. However, I do have some reservations about some of the big things that the survey results showed in favor of Sierra. Cataloging, acquisitions and reports were listed by the committee as more favorable in Sierra. I don't use these features often in my library and I trust the direction of the WVLS staff to do what is best for the consortium as a whole. Those do seem like pretty big things that we need to have work properly. Maybe they are not worth risking in the new system."

C. Luebbe shared that her preference is Sierra. It has been working for V-Cat for number of years. We understand it. Koha looks promising, but it will take us a long time to get it doing what we would like it to do. Collectively will may struggle with having enough staff to quickly get a handle on things. I agree that customer service looks good, but do we need to join a company where the product is still in development? It will be a while until some of this is improved. We could migrate later. The money that is in reserve for a new ILS is not free money, if we use it we will need put it back. The smallest libraries do not save very much per year, about the equivalent of 10 new books. It's a lot of disruption for gain that is uncertain or possibly minimal. I think we need the higher-level functionality that acquisitions, cataloging, and reports give us in Sierra. It might be said that we should make the change because we've spent so much time on this committee. No, it's not a waste of time. Consider this time learning that we will be able to apply in the future. I believe that we should stick with Sierra for several more years.

M. Pregler stated that she is in agreement with C. Luebbe. She does not feel the financial cost savings outweighs the risk we would be taking with Koha. There are too many unknowns and unanswered questions. She suggested that we wait and see how the product develops. V-Cat as a whole has seen a considerable amount of staffing changes. The need to learn something new might cause more turnover. She suggested that we look at Koha again in five years.

T. Blomberg stated that she is leaning towards Sierra. All throughout the process she has been waiting for something to pop out and obviously point "this is the way to go." Koha seems to have great customer service, and a good patron experience. However, she felt there is too much work and training involved in the new system to justify switching.

M. Handel favors Koha. After going through everything she liked their circulation module. She shared that her cataloging staff really likes Koha but does have a few concerns about the amount of time it will take to catalog items. A lot of the staff in Medford feel the Sierra features don't work well and want to try something new. The lower financial cost is a plus.

A. Greenhaw noted that her response was not hers alone, but on behalf of all staff and management at Rhinelander District Library. They prefer Koha. We want to get away from Sierra customer service, ala carte add-ons and cost, and reports. There is frustration in pulling the

same report different times and getting different results. As far as transitioning to a new system, they are not concerned. We've done it before and we can do it again. CLAMS noted that with Z39.50 cataloging workflows we should not have the same issues they have. All this is before considering the cost savings. Koha and Bywater are forward moving, with new features we want to use. Sierra is an old system.

A. Johnson noted that this was a difficult decision. We discovered most ILSs are within a certain range of average. They all have their plusses; they all have their negatives. Sierra has things that frustrate us and things that work well. Koha has things that look like they would work well, and things that look like they might be difficult for us, particularly in some of the more niche functions like reporting, cataloging, and maybe acquisitions. While Koha could bring some improvements, the uncertainty around those functions means that there is uncertainty about the potential benefits of Koha. It is difficult to say that the benefits outweigh the change disruption over the span of time. This adds up to Sierra being the better choice for MCPL in particular, but also other libraries that might be considering using more of these functions.

H. O'Hare reported that she's spent a fair amount of time going through her notes from the beginning of this process, and the work of the committee, and posed multiple questions. How do we move into the future? It is difficult to consider what is best for us presently, and what is going to be the best for us as we move forward and shift. No matter what, it is a difficult decision. She tried to set aside the effort of training, as once it is done it's no longer a factor. She focused on once a product is in place, and how it works. She was impressed with Bywater's customer service and that they will be working on and supporting the product. Her major concerns are with cataloging. She and her staff worry about the volume of cataloging and how changes in the workflow may change the amount of time it will take to catalog items. She considered what things we could do to prep or get ready that would make Koha better, more efficient. How long will it take to work out the bumps? Is it better to wait, and stay with our current system so that we can continue to provide the good service we have currently? It's hard to be on the fence, but I would say, that's where I am. I do know that having a good working relationship with a vendor can be just as important as having a good day to day workload.

K. Zimmermann noted that there are positive aspects of each product. For our frontline staff that work with circulation and patron records, helping folks to place holds on items and fines management - Koha is superior. It provides improvements for things that libraries have been asking for to be fixed, that Sierra has not been able to do, or has not chosen to develop. For example, the ways that we've asked to be able to search for patron records by birthdate or partial name. In system administration, Koha is also stronger.

K. Zimmermann noted that administering Sierra is challenging and a big part of that is customer service. Part of that is also that as a proprietary product Sierra is less transparent. The Koha settings are transparent. They may be more difficult to administer, but there is transparency, availability of information, and more help as we've already seen from Bywater with Aspen Discovery. She has more confidence in Bywater and Koha into the future. When it comes to compatibility with other products, Koha may have more ability for future developments. The APIs with Sierra are very good, however there are some things that currently don't work as well

as we would like, and we do not know if they will be developed. The same is true for Koha, we don't know for certain about future developments for either product.

When it comes to reports, K. Zimmermann believes that Koha will be better in the long run. She has heard repeatedly from V-Cat catalogers that the change to Koha could be difficult as the features used in Sierra are beneficial. A transition from Sierra to Koha could also be bumpy for ordering and acquisitions. However, if more libraries want to use acquisitions, Koha would be better because additional libraries will not cost more on an annual basis.

K. Zimmermann shared that she feels the cost comparison could be a little bit more of a wash as far as the amount of money that that could potentially be saved. We do not know for certain what additional products we might want or need over the next five years with Sierra or Koha. If we need additional features with Koha, it would not be in an annual amount of money, but it might contribute to a development with a group of libraries or consortiums. With Sierra we don't know if there are other products or additional licenses we might need, which would add to our annual cost. It's hard to predict into the future

K. Zimmermann noted that a migration is a process, an adjustment and not the long term. She asked committee members to consider the following questions:

- Which of these is going to be better for our patrons?
- Is now, in the next year and a half to 2 years, the right time to migrate?
- Where do we want to be in 5 years?
- What company do we want to be working with in 5 years?

R. Metzler shared that from the WVLS point of view, the team is here to serve libraries and provide service with whatever products the consortium decides. She feels somewhat neutral about this decision. From her point of view working closely with catalogers, the cataloging transition may be tricky, but we can do it. In some ways the standard view in Koha will be really good for MARC alerts. Data entry in that form will feel routine pretty quickly. There are things such as the tiling of windows that we lean on that can be replicated in Windows 11. She stressed that our collaborative method of cataloging can be done in Koha. There will be a transition time where it may feel significantly slower. She expressed excitement about working with a different customer service team. However, we know Sierra, and we know how innovative works, and it's a good thing. Ultimately, she does not have a product to recommend, and will support what this group and V-Cat Council decides.

A. Johnson addressed committee members that are still undecided, asking what they need to hear to come to a decision.

T. Blomberg asked about the NICE project and the possibility of merging ILS with NWLS. Would it be easier to merge and migrate at the same time? Or migrate then merge? Merge then migrate?

A. Johnson clarified that this committee is meant to select a product to recommend as the best product for V-Cat, but isn't addressing the timeline.

K. Zimmermann noted that it will be recommended either this committee, if agreeable, or by herself that V-Cat delay migration or renegotiation of a new contract until the end of next phase of the NICE project in June of 2024.

C. Luebbe asked about the next phase of NICE project. K. Zimmermann shared the NICE project key takeaway document including next steps, and the full report on the NICE project website: nicelibraries.org.

A. Johnson asked those that were on the fence to help identify what may help them make their decision. H. O'Hare shared that her concern is the cataloging workflow and adding to the daily workload of data entry.

A discussion followed about cataloging workflows and potential change. Concerns came down to Koha frameworks and the inability to prefill data fields. R. Metzler cautioned against trying to fit the Sierra cataloging workflows into Koha like a round peg into a square hole and noted that it's possible that there's a workflow change that could occur that better suits Koha. She noted that none of us have been trained on the product, and from her experience, the Z39.50 cataloging in Koha will function very similarly to Sierra. It was noted that prefilled data fields are available in item record frameworks and adding prefilled data fields to bib frameworks may be possible in a future Koha development. Macros were also discussed. Koha itself does not have macros, however browser-based macros or macros plug-ins may be available.

It was noted that there would not be big changes for attaching items to existing bib records. R. Metzler noted that cataloging is something that affects the patron. We want records to look good, and we want to get materials ready and going quickly for patrons. She noted that it might take longer, especially at the beginning. However, Koha can work for cataloging. We can use it to catalogue with whatever utility we want with a slight improvement in bib frameworks, we could do mark alerts similar to how we do now, or we could investigate workflow changes.

H. O'Hare and T. Blomberg considered this information alongside their libraries' cataloging workflows and needs.

C. Luebbe noted that what may be best for our patrons and noted that a lot of the ILS is invisible to our patrons. Aspen has already been a great improvement.

K. Zimmermann noted one pain point in Sierra that could possibly be better with Koha – the way that high demand holds now with patrons are unable to get on the waiting list. One other possibility that could be better with Koha – staff searching at the desk. The searching and holds placement workflows are better than Sierra. Patrons might be affected by the migration.

M. Handel noted that searching in Sierra can be difficult, sometimes taking a lot of time to work around that. Koha may assist with the speed of answers and reduce wait times.

A. Greenhaw added that Koha's browser-based feature allows for outreach events with circulation outside of the library. Also, if the internet is down a hotspot could be used to keep things running.

A. Johnson noted that the meeting is scheduled to go until 12:30. To wrap up in time the committee needs to vote in a few minutes.

K. Zimmermann reviewed the purpose of the committee: The V-Cat ILS Evaluation and Review Committee is charged with reviewing available Integrated Library Systems / Library Service Platforms and their viability for the V-Cat Consortium. Ultimately the committee will be expected to present a recommendation to V-Cat to either re-negotiate the current contract with Innovative or negotiate a new service contract with another vendor.

Select ILS product for recommendation

C. Luebbe moved to present a recommendation to V-Cat to renegotiate the contract with Innovative to retain Sierra, seconded by M. Pregler.

A roll call vote followed:

A. Greenhaw: no
M. Pregler: yes
H. O'Hare: yes
M. Handel: no
A. Johnson: yes
C. Luebbe: yes
T. Blomberg: no
R. Metzler: abstained
K. Zimmermann: abstained

Motion carried.

Determine approval process for final report to V-Cat Council

K. Zimmermann reviewed the report structure for the report to V-Cat Council.

H. O'Hare believes the report is very thorough and thanked K. Zimmermann and A. Johnson for their work.

A. Johnson noted that with K. Zimmermann he will prepare the report. It will be sent out to committee members.

Set Next Meeting Date

Wednesday, September 30 9:30 am was selected as the next meeting date to approve the final report.

No additional agenda items were suggested.

Adjournment

A. Greenhaw moved to adjourn, seconded by M. Pregler. Motion carried. Meeting adjourned at 12:33 pm.