

OWLS/Winnefox small group conversation August 5, 2015

This is a report of the small group conversation held on August 5, 2015. The group had a wide-ranging conversation, and the report attempts to group and summarize the results. The report is arranged by system service area, with additional information at the end.

Provide and support library technology

Overall, participants are happy with the technical support they receive from their systems. They expressed appreciation for the staff and for the timeliness of the help they receive. Because both systems are generally happy with this service, they did not feel this was an area where combining services would be beneficial. They were concerned that combining services could result in losing staff and quality of service.

Provide professional library consulting

The overall theme in consulting was that the participants wanted additional help that wasn't currently available at their system. Below is information about specific consulting areas.

Graphic design/printing: Winnefox is losing their graphic designer and printing services. Some participants from Winnefox felt okay with that, but some would like to have the service available to them, if the quality of the design services and printing was higher. OWLS participants expressed high satisfaction with the graphic designer, but also felt that he did not have enough capacity to be shared with Winnefox. He already has too much to do. Having libraries provide the service to other libraries could be an angle to explore.

Public library consulting: Some Winnefox participants expressed appreciation for Mark Arend's assistance with public library issues, which is especially helpful for smaller libraries. Rick Krumweide used to provide consulting services in this area to OWLS libraries (including space needs, strategic planning, etc.) He had a wealth of knowledge, and his loss has meant less public library consulting available to the member libraries. OWLS libraries are relying more on their peers for answers to their questions.

Mark has also provided trustee training, even outside of the system, which is very helpful. Participants from both systems expressed interest in consulting related to buildings (new buildings, building design, maintenance, bid processes, etc.). Some Winnefox participants have talked to Mark about these types of questions. Both systems felt having a "level headed mediator" who can help with their municipal bodies, county issues, etc. would be valuable. Both systems felt that having someone who could help with data collection, analysis, and visualization would be helpful.

Youth services: One of the libraries in OWLS provides this service for the other libraries. {I wasn't clear how this is provided for Winnefox?}

Provide and manage ILS

Overall, participants are happy with the ILS and the ILS support they receive from their systems. Participants felt that having a combined ILS/catalog would provide a significant patron benefit. There could also be additional power with the vendor, both for purchasing discounts and also for development of important features.

Concerns/questions (in no particular order):

- *Platform*: what one would be selected? There could be resistance either way, as no one will want to change and learn a new system. How will it be decided? Would selection be influenced by system staff, as they would be key in determining what direction to go, and the choice could mean someone's job? OWLS libraries in the room noted that they had "jumped ship" and it was pretty painless. They have discussed jumping ship again.
- *Staffing levels*: if the group is too big and the staff is too diluted (because of staff consolidation), response time and general service will suffer, and that would be bad. If staff had skills that were no longer needed, maybe those individuals could do something else instead or be retrained so that it could result in faster response time.
- *Cost formula*: how much is the system contributing to the ILS? How is the amount paid per library determined? How would this change? When a formula changes, there will always be winners and losers. There is a difference in formula between the two systems:
 - In OWLS, increases are an equal percentage for all libraries. It's not really based on a formula at this time. It is something that they have been discussing.
 - In Winnefox, circulation is a large factor in the formula, so libraries with an increase in circulation have the most significant increases.
- *Branding*: Infosoup has strong branding right now. How would that change if the ILS combined?
- *Existing relationship between OWLS and Nicolet*: what would happen to that relationship? Some felt that, for those in the Fox Cities, it would make sense to have a relationship with Winnefox instead of Nicolet (if there were only two systems in the group). However, some libraries in the northern part of OWLS may not want to see that relationship change. There is a perception that, because Nicolet libraries are not as well funded, they tend to "suck resources" from the OWLS libraries. Historically, there is documentation to show that Nicolet is a net borrower in the relationship.
- *Cataloging*: The two systems approach adding catalog records to the ILS very differently:
 - In OWLS, libraries can download records to the ILS. Many of the libraries are using acquisitions, so the first library ordering needs to bring the record into the system. The records can only be edited by Appleton Public Library. When a record can't be found on Skyriver, a new record will be created centrally, but this can take up to three months.
 - In Winnefox, records can be added by Winnefox staff only. For some libraries, this is a concern, as it slows down the processing time for new items. There was frustration expressed about the amount of time it takes to get new records into the catalog. There is a cooperative technical services service for libraries that want to participate.
- *Brown County*: There was concern expressed about Brown County joining the ILS. The general feeling was that libraries are not interested in having Brown County as a participant because they had heard bad things about them.

- *Delivery time*: delivery of items could take longer. The group discuss routing rules and the potential to select fill locations to improve delivery time.
- *Policies*: what policies would change? What are the consequences of these policy changes? What are the benefits to the patron to have standardized policies? The level of local control in policies appears to be higher in Winnefox than in OWLS. How much autonomy would have to be given up and what would be the consequences?

The example discussed was TV shows: in OWLS, all discs in a season circulate as one item. In Winnefox, libraries can decide. Having to follow OWLS' policy would result in a significant decrease in circulation for some libraries

The group discussed that the patron is often the winner when policies are standardized and simplified. Different rules also lead patrons to library hopping and manipulating the system.

Fine policies were briefly discussed. There does seem to be some difference between OWLS and Winnefox on fine policies. In OWLS, fines are based on where you check in your materials and there are no swapping of fines paid. {I did not get the policies for Winnefox}

- *Decision making*: OWLS has a tradition of decision making by consensus. While they have a formula for voting, they don't often use it. It could be harder to get to consensus with a larger group, depending on the environment. There could be other models for decision-making. It may not be everyone getting together and making the decisions. There could be representative models.

We further discussed the possibility of having all three systems in one ILS/catalog. Patrons want more stuff and want it now, so having all three systems together may make patrons happy. However, there are some concerns about the group being too big:

- *Decisions may take longer to be made*: it is challenging to find the balance between individual library needs and being good collaborators. It is also difficult to find the balance between the needs of the large and small libraries. Having three systems together may make it more challenging to get to good decisions. As physical circulation declines, there may be a need to spend less time and energy on decisions related to how we manage our physical stuff, so this may not be as big of an issue.
- *Having more locations could mean more confusion for patrons about what materials are in the library*. It would be important that patrons would only see items in the library first. This is complicated, however, by multiple bibliographic records for the same title. There is not, so far, a way to ensure that the patron will select the bibliographic record where the copies for a specific library are linked.

Provide secondary ILL and “back-up” reference

The group felt there was no advantage to considering combining ILL. Back-up reference isn't really a service for either system at this point in time.

Coordinate and provide physical delivery

Overall, participants are happy with the delivery service they receive. The participants felt that the average fill time for an item in the ILS is about the same: 3-5 days average. They did feel that people would be happier with more delivery between OWLS and Winnefox. The conversation did highlight some of the differences between the two systems in delivery service:

- All OWLS libraries receive 5 day a week delivery; Winnefox libraries receive delivery based on volume.
- OWLS has in-transit sorting, so turnaround time on some items is very fast.
- Winnefox does their own delivery; OWLS is outsourced.
- OWLS has ILS routing rules; Winnefox does not.

Coordinate electronic resources

Both systems contribute funds to Advantage accounts. Winnefox does not fund any additional databases; OWLS funds the databases all the libraries have beyond BadgerLink. Appleton also has some resources that other libraries can use.

Participants felt that they may have more purchasing power for electronic resources if the two systems were to purchase as a group. However, there was a feeling among many participants that these electronic resources are not heavily used, and my impression was that this was not a priority area for shared services.

Coordinate and provide continuing education

There is much less in-person continuing education than there used to be, and there is already some shared work between the two systems (though not a lot). The group felt that both in-person and webinars had value. It would be beneficial to have more collaborations, as was done with “Project Play.” Continuing education seems like the easiest place to collaborate. The group thought that there would be value in Nicolet, OWLS, and Winnefox all collaborating on providing CE. There are three CE coordinators between the systems, and there could be fewer and have greater efficiency. It seems that most of the webinars are coming from Nicolet, and OWLS is doing less CE than they used to. Winnefox libraries indicated that they did not perceive CE as a strength of the system. It was suggested that using non-library community partners for CE could also have value. People out in the community (municipalities, non-profits, etc.) are providing great continuing education opportunities and if systems could make those connections, it would make the systems more visible and provide the community agencies with value from the systems.

Training for new directors was discussed. When a director is leaving a library, there is rarely overlap, so the system is the constant that can help. The participants felt that Winnefox did a good job in initiating and training new directors. They meet with multiple people, etc. Participants felt that new director training was lacking in OWLS.

Concerns/questions:

- *Driving distance:* Location could be a barrier if people have to travel further for CE events. It could be possible to hold in-person events in multiple locations.

General themes/questions/concern

Crossover patrons

One overarching theme throughout the conversation was the number of crossover patrons in the area. Many patrons use multiple libraries, particularly in the border areas and in the Fox Valley area, and some rural areas see a level of crossover, too. Having the border distinction between the two systems can be difficult with this level of shared patrons.

There will be less of a close connection with other library staff in the system:

There was discussion about the impact of having a larger group of libraries involved in meetings and services. There could be less familiarity and strong personal relationships, which are especially important for small libraries who need the resource of colleagues. When you are the “one man show,” you are everything, and need to have people to talk to about issues, questions, etc. Perhaps in addition to county meetings (which are monthly in Winnefox), there could be larger regional meetings, perhaps quarterly. Perhaps small libraries could get together to talk. There would be more small libraries, so there may be an advantage to having more libraries working together.

Relationship with the resource libraries, systems, and other libraries

The OWLS participants felt there was a good working relationship between the system, Appleton Public Library, and the other libraries in the system.

There was a conversation about the relationship between Oshkosh Public Library and Winnefox Library System and OWLS libraries asked if there were issues with there being one director for both. The general feeling seemed to be that this relationship did not necessarily privilege Oshkosh Public Library, but that there is intertwining of personnel and budget between the two organizations, which could make combining services or cutting services provided by Oshkosh Public Library challenging. The group felt that having one director may have had a value historically, but, to outsiders, it doesn't make sense.

There was a general feeling, too, that the concept of resources libraries is outdated. The system could contract with the resource library for services as appropriate.

Membership fees

In both systems, the fees paid to the system are not for specific services but for multiple services in aggregate. There is a new service that will be paid for individually in OWLS (“Sierra in the Wild”) but this has not been the case in the past.

What would happen if things stayed the same

Both systems are having money concerns right now, and if things stay the same, it will mean less services or increases in fees. As circulation goes down for some libraries, they are losing money from the county and their municipalities have to make up the difference. They do not have the budgets to pay more without cutting. There will be degradation of services if libraries can't pay more. If the libraries pay more, their collections will suffer. There is a need to look at radically different models for system services. There was some discussion about the amount of input the libraries have into decisions made at the system level that impact the libraries' budgets. Some libraries would like to see the libraries have more oversight into how the systems are choosing to spend their money. As libraries have to make tough decisions and cuts, it seems that the systems should have to do the same thing and not keep increasing libraries' fees. There seemed to be particular concern among the Winnefox libraries about the increase last year and the difficulty the libraries are having justifying the level of increase to their municipalities. OWLS had a 4.5% increase across the board last year, but it was because of the addition of Encore. There was a level of trust of OWLS expressed by some participants: they feel that they are getting value for the money spent. The libraries need to be willing to change and to give up small controls in order to give patrons better service or we are all going to lose. Having this conversation is incredibly important, and we don't want to lose sight of the fact that we are here to provide services to patrons. Systems are completely funded by USF, which is pretty precarious, so we need to be looking for alternatives.