

**Ohio Libraries Statewide Resource Sharing Focus Group  
Columbus, Ohio  
Wednesday, October 24, 2007**

**TOPICS FOR DISCUSSION**

**(1) What do you like and dislike about OLS MORE?**

**• Your use of it?**

- P11 Working with MORE since beginning. It's gotten a bit better but, it is still pretty time consuming for staff. We don't have it open to patron use, just for staff to offer to patrons. Patrons like that they can get.
- P12 Thought it was too time consuming for staff and then heard that it would make even more work if it was open to patrons so didn't do that.
- P10 Problems arise with the two catalogs. Patrons go right to MORE and search first before even searching their own library's catalog. Staff has to go to correct them. But people who use it & understand it, love it. We teach them to use it themselves.  
Our interface says "can't find what you're looking for...go to MORE." New users don't seem to know how to do it but there is a brochure to help them and they seem to ask for help. Staff helps them & then patron knows how to use it usually after first time help from staff. It is a bit of a pain teaching them but in the long run it's worth it. Don't think patrons searching causes more staff work.
- P5 Staff initiates requests that patron asks for.
- P12 Depends on your environment. We are already in a consortium & have a lot of ILL requests through that consortium already.
- P12 Never let patrons search, had heard it was incredibly time consuming for patrons & added lots of work to staff. We made decision to make it staff initiated plus our consortium fills most request anyway.
- P14 Workflow is rewarding but it takes a long time.
- P7 Suspects it's mostly staff searching. Libraries letting patrons control the searching are in the minority.
- P11 People find out about it by asking if the library can get the materials anywhere else.
- P7 We advertise the MORE service. We have brochures but not sure that people read them. People come to desk, say they can't find something in catalog & ask if staff can help. Then staff tells them they can possibly look for it at another library.
- P14 Patrons ask at the desk, main library prefers that & a lot of time we actually do have it. Also, if a patron asks for it we may buy it.
- P4 I'm a member of SEO & don't currently use MORE.
- P5 Patrons really like the service, hear a few complaints about tech problems but mostly it is good.

- P10 I agree, my staff likes it also. We provide 5200 transactions a year through MORE. A lot more patrons use ILL now than they used to before MORE. Not many people used that one, they like MORE. My staff person who works with MORE spends about 2 hours a day on MORE, it is increasing and will probably eventually take a staff person's whole day.
- P12 We're a Horizon library, don't have NCIP, wasn't a smooth workflow. Is everyone aware that if NCIP is not available, the transactions are not smooth?
- P14 Had 6000 MORE searches in October alone outside of library hours so that means many patrons are using it. And I don't think it is a rogue staff member!
- P11 Zportal has improved the ease.
- P5 Has heard positive comments since the search update. But thinks interface is not well designed. Functionally it works well but the user experience is not smooth when using patron self-service.
- P10 Savvy computer users can figure it out.
- P11 Placing a request in the system. Patrons are pretty good at it. But on the processing part, a lot of menu choices don't apply to our library at all. Could they be eliminated? All the menu options confuse when training people.
- P5 Seems like the product was designed to meet so many libraries' needs that there's a lot in there that doesn't pertain to each library.
- P7 Has heard that if a physical person at your library doesn't get the pull list everyday, it just sits there for 3 days before moving to another library. That's a long time to wait for the book request to bump to the next library.
- P5 We have very good results about how long the process takes. Usually get materials fast enough & always tell patrons about the time the process takes. We try to lower their time expectations – tell them it could take a week or two to arrive. Don't know if patrons are just resigned to this or are really okay about the time. Usually see loans come in about 2 or 3 days.
- P10 We tell them 2 to 3 weeks, doesn't mean someone will fill it right away. We don't know that its coming until it says "shipped". We tell patrons to call us if they haven't received it in 2 weeks but hardly ever hear from patrons.
- P5 Would feel daunted to go into the MORE system to track the request. Can patrons do this?
- P10 Patrons can do this but they still only see 'shipped' or 'returned' designation.
- \*P1 Has the State Library of Ohio done a study of the length of time of delivery?
- P10 Was it SIP2 or NCIP that they were working on with OCLC PICA?
- P14 They have had some success in creating another item record in another system. Is pretty close to being ready to being tested in Cleveland. Haven't figured out how to configure SirsiDynix. Haven't figured how to integrate the pull list.

**FACILITATOR: Expectation that the test will lead us to a working product?**

- P14 Are hearing from OCLC that as they find out about one problem they are fixing another and that they are making progress.

**FACILITATOR:**

**How do you feel about OLS MORE's:**

- **Operation**
- **Its performance**
- **What feedback on OLS MORE have you gotten from you patrons?**

P10 Like it or hate it, until coming up with a substitute, we can't do without it.

P5 My staff says the vision of resource sharing is a great idea, wants new version to attract even more libraries. The staff would like to see more libraries participating because of the philosophy behind resource sharing.

**(2) What are your suggestions for a Next-Generation Statewide Resource Sharing System?**

**• Is the vision for print-resource sharing still valid: "Anyone, anywhere, at any time can borrow anything from any other Ohio library"?**

P3 What would you say to people if books could be delivered in 2-3 days, if libraries would absolutely do pull lists everyday, etc. We already have this – it is called SEO. When OHIONET came on, previous SEO director had vision to offer SEO to all Ohio libraries. The only downfall was that all libraries would all have to use same ILS. If every library's patrons could see SEO ILL system, they'd never want to use anything else. Can run hold list for every library in system. It is wonderful.

P12 That's basically what we have in our consortium. We want it all to work seamlessly for everyone in the state. The same platform be in open source or whatever (State pay for every libraries' platform?) People want the independence to do their own library business. We have to find cross platform software that can do that.

P10 With SEO it works because all libraries have to buy into the same ILS. But MORE lets each library use whatever ILS. Why can't SEO work within MORE also? I can control reports very quickly – can SEO?

P3 Yes, we can do our own reports.

P10 Giving up local controls is what I don't want to do.

P14 I agree. We've been running a consortium a long time, everyone within that group has transparent use of other libraries but the whole point of MORE was to tie disparate systems. It seems very unlikely that all Ohio libraries will be willing to go with same ILS. PINES is much smaller than what would be needed to cover all of Ohio libraries. MORE was very important to letting independent libraries or small consortiums talk to each other.

**FACILITATOR: Have shifted to topic #2. What else would we like to see in the next phase of OLS MORE/ Statewide Resource Sharing (SWRS)?**

- P4 NCIP is critical to the success. Not only NCIP, but checkout system needs to be there as well. It needs to detail the patron record and generate it right away – make it seamless.
- P13 We're part of SearchOhio. New system has to be convenient. Cannot be staff mediated, has to be patron mediated. Not going to get 250 libraries to agree to same ILS so SIP2 is very important. For our patrons, a wait of 2 weeks would be unacceptable. Has to be easy – just do one search in the system that will cover your own system and automatically search the other libraries. Plus, one library can't fill all the holds.
- P2 We moved 111,000 loans in September with ease. We need the seamlessness. Everyone wants to hold onto their own system/functionality – if libraries don't want to buy into the seamless system, they should examine if buying the items would be more cost efficient.
- P13 Does Ohio need a statewide resource sharing system?
- P4 Our small library doesn't send much to OCLC (3 – 4 a month).
- P5 So are we saying we don't need a statewide system – we just need a regional system?
- P13 Originally about 70% of items were owned by one library. Now it's much more balanced. In our consortium we all have different items.
- P3 Before SWRS we couldn't get books from other libraries unless we typed up a clunky card asking for loan.
- P9 I'm a member of SEO. SEO has the system honor holds to libraries in our area first. If we go with a statewide version, we need to have a system that ensures our patrons are taken care of first.
- P1 Tension between your own patrons and other libraries' patrons struggling to get the items first, it is inevitable.
- P9 SEO has this worked out extremely well. We meet their needs & yet they have the capability to also borrow just about anything else.

**FACILITATOR: How did you set parameters?**

- P9 Each library has the capability to scale it to their area. We were first part of a county-wide system so we always loaned throughout county & patrons are used to it.

**FACILITATOR: Any concern with balancing where requests go?**

- P9 Patrons have a choice where the item comes from; they don't have to use a library in the area. Other non-SEO libraries do borrow from SEO libraries. It takes a lot of staff time to deal with the non-SEO library requests. We get 100 bags a day from SEO; don't know how we would cover bags from all over Ohio.
- P4 We run pull lists 3 or 4 times a day. Recently needed a request the next day – placed a hold at 2:30pm and got a hit and got the item by the next morning. Our staff is devoted to getting

items quickly. We pack everyday, every night. SEO would be a good member to be on MORE because SEO is so used to it.

P10 SEO ease is because it is same platform. Pull list is easy to get because of the same platform.

P14 NCIP will allow pull list from all different types of systems to appear in your systems automatically. We can differentiate who wants the item and can give items to CLEVNET members first.

P13 Our consortium has a load balancer.

P5 How/why do you place a loan from a particular library?

P9 People may want to drive there and pick it up at close library.

• **What would you like the system to do?**

P8 We haven't talked about sharing with schools or academics. Original the vision was for multi-type libraries to share. For survival of libraries, it is good to get students used to ordering item at school, getting it at school, and this experience will be nearly the same as ordering a book at public or academic lib as they grow up. We're doing a great job with academics, a good job with schools, but not so great with publics. Our ultimate vision should be multi-type libraries, patron initiated requests. We should think about getting past our stand alone systems for our patrons ease of use. We should think about integrating everything into system.

P4 Integrate print on demand.

P1 Integrate digitization on demand.

P8 Home delivery.

P9 Many years ago a patron survey response indicated people wanted their items to be home delivered – wanted the items to come through their mobile devices pronto.

• **What marketplace solutions should RMG's RFI investigate?**

P13 Innovative's INN-Reach should be investigated.

P14 Have to make sure it can handle disparate systems for at least awhile, and to put everyone on equal footing. Innovative is in Michigan & maybe Pennsylvania.

P8 This will have to be a transition. For everything that works well there is one system that searches. We need to pay attention to that. I don't see how we can get everything from one vendor. We will have to try to get some features as add-ons from other vendors. If all libraries in all countries created sharing solution we'd be ahead.

- P5 Can open source be a solution? We should look at this. Are we going to pay someone to develop a system for us and then let them turn around and charge us for it?
- P8 Big open source creator - OCLC? We built WorldCat because all libraries contributed and worked together. Maybe we should try to build this magic system together with all other libraries with OCLC's help possibly. I know they are already working on this issue. Libraries have a better chance of survival if we work on this together.
- P14 OCLC PICA, Sirsi Dynix Ursa, Innovative INN-Reach, we should look at all three.
- P4 Would like a hold alert whenever patrons are asking for a book in large numbers so we know we should buy it. Now we can run a report but want an alert.
- P12 Lightning Press should be looked at on statewide level so if you can't afford it, you can license it, print it, ship it. There are a lot of materials we can't get because they're at academics.
- P13 We also need to work to reduce barriers between public libraries and academics.
- P8 What about ebooks, e-audio, e-video and e-music? Want that searched as well?
- P5 Federated search.
- P8 Want a really good federated search.

**FACILITATOR: Should we start loaning readers/players and such for e-materials?**

- P1 No.
- P7 Patron will want to choose the format they're looking for, be that Chinese language, CD versions, tape etc.
- P14 Patron should have control over their holds, should determine if they can renew them, move them around, like Netflix instead of being inundated with items all at one time.

**FACILITATOR: Should staff have the oversight ability on that?**

- P13 It's a parameter you can set.
- P5 Don't know if it would be a concern.
- P9 How long is the hold in our system? That's a concern. Don't want it on hold 6 months.
- P5 Patron might want the hold to expire in x-number of days – they should have the capability to set that.
- P8 Make it as good as Google. Or better.
- P13 Has to be a system that you don't need to train the patron to use.
- P8 We should think about going beyond statewide borders. We should look beyond Ohio and the USA.

**(2) How best can we get from here (from OLS MORE based on VDX) to there (to the Next Generation SWRS System)?**

**• Funding?**

**• If there's not a "full-fledged solution" out-of-the-box that can meet all perceived needs, would you support an evolutionary approach as the next phase of SWRS?**

P8 If we took all the money that all 250 libraries are now spending on their ILS, I think we could find our solution. We're missing an opportunity if we try to patch it all together.

\*P1 Do have a figure on that? On an ILS, staff, delivery, etc.

\*P8 Just talking about ILS system. Invest an amount equal to one year of all 250 libraries paying for their ILS. Suggest we all agree upon and share one ILS.

P7 Agree.

P5 Like a Microsoft server – as long as they speak the same language, you can have different systems. Throw out NCIP and get something else. NCIP is too unwieldy.

P8 Think about our patrons and not ourselves. Not saying we all need to be exactly the same, we should be able to keep some individuality. Interaction with ILS would just look very similar throughout schools, publics, and academics.

**FACILITATOR: What percentage of your yearly budget is hardware/software ILS expense?**

All Reply: Varies but minimal. 1%, 2%.

P4 If you can offer additional functionality and features for patrons, the same system could work.

**FACILITATOR: What percentage of our budget are we spending on resource sharing and delivery?**

P4 Quarter of a percent.

P12 Depends on library. CML probably spends a lot more than that.

P1 The delivery is minimal, we pay a flat fee.

**FACILITATOR: Recurring cost of integrated library system?**

P14 \$220,000 a year on ILS a year is not a lot of our budget.

P8 Impediment is start-up fee. Maybe throw in cost of upgrading your system every 5 years.

P4 Use state money – that's how we started OPLIN.

\*P4 When OHIO LINK started, was there start-up money?

P8 Tons of money. Board of Regents and state legislature gave money. But stipulated that all had to be on same system.

- P13 Our consortium start up was cost \$111,000.
- P13 You won't get Ohio libraries around the state to put money into a SWRS start-up because MORE never delivered.
- P6 People won't give money because MORE didn't work. If MORE works, or once the new SWRS system is proven to work, the libraries would then pay.

**FACILITATOR: What are you thoughts behind these assumptions? What is the technological model that we want to develop?**

- P10 Lots of money to develop it and maintain a new system. Who is going to maintain it?
- P2 We've had our ILS since early 80's. Anyone who thinks open source is easy and/or free, is wrong.
- P5 In open source, money is needed to continue innovation in product and maintenance.
- P13 Open source will work when Columbus or Seattle or New York make it work.
- P2 If we are to work together on open source, we either have to agree to standard functionality or to have a lot of money to create everyone's wants/needs. Also, we don't need to spend a lot of money to create this system if it is cheaper to buy the books.
- \*P13 Has anyone done a review of how much buying all these books would cost?

**FACILITATOR: How willing are libraries to work on an evolutionary product?**

- P14 & P5 It would have to be evolutionary.
- P5 In talking about this grand scheme to replace the ILS & resource sharing, this pushes the creation way off in time. But, if we only look at something that is going to replace the resource sharing aspect, maybe we should do that first.

**FACILITATOR: Good point: Are we talking about a "super ILS" or talking about resource sharing?**

- P14 The technology to support all Ohio libraries is just not out there right now. The level of activity in Ohio is so high. It would be better to get some resource sharing system now and worry about ILS later.
- P2 I agree. We have so many issues that we're working on with our ILS system. What we're looking at changing what we're doing with the resource sharing system is going to be hard enough. Vendors have problems with just dealing with the large library systems, how could they deal with a statewide ILS?

**FACILITATOR: Could you expound on the OCLC issue and WorldCat creation?**

- P8 Fred Kilgore would say "get with it." Libraries are in peril – not right this minute but it is coming. Ohio could be a pilot for a vendor or OCLC. Don't know where the money would come from –

state legislature or LSTA or where. We all have to give up something in order to get a better system.

P3. I'm willing to give up a standard loan time. Some people are so hung up on that, they can't get past it.

P8 If Georgia can do the standardization of procedures so can we.

P3 Every library's board of trustees should not be involved in setting loan times, etc.

**FACILITATOR: What else are we willing to give up?**

P9 I look at it in reverse. What are all libraries going to get? Remember OPLIN? Some libraries didn't want T1 lines. We have to look at it from the positive perspective. The patron has to drive us, it's not about the library staff, it is about the patrons.

**FACILITATOR: Is the notion of a single state card on the table?**

P9 Went to a county-wide card years ago, it works great. Now across several counties. It makes a lot of sense.

P13 Or if not one card, just all Ohio libraries' cards should be taken at all Ohio libraries.

P9 College students from out of town can use their own library cards from their hometown in our library.

P3 Look more at SEO. They've been doing it a long time and under the auspices of State Library of Ohio. Horizon could work better but patrons don't see that. Maybe the SEO group could be the tester for what State Library of Ohio wants to do on the whole.

**(4) How important is resource-sharing to your library users?**

P14 Resource sharing is extremely important but some libraries don't feel that way because if a library is already in a consortium, they sometimes feel they already get everything they need.

P7 In terms of the patron, it's not important at all. The patron doesn't care; they just want the item as soon as they can get it. To the library it's very important because that's what we use.

P13 Timing of getting the item is important but we're doing that with the system we have now (not MORE).

P8 Some libraries are afraid of joining larger consortium but once they do it, they find that both libraries win.

P2 Agree. The libraries that have a partnership with us are a boon to our library.

P8 Some libraries think they are doing well at covering their patron's needs, may not be getting all the requests they would if it was apparent there were more resource sharing options.

P2 Poorly designed catalog may trip up a patron. The item may be there but the patron just can't find it.

• **With the resource sharing environments in Ohio, in your opinion, how important is OLS MORE?**

P5 MORE is just one of many resource sharing systems we use. We don't want to lose any of them.

P9 Why wouldn't you want to go with SEO as a smaller library?

P7 There used to be need for two terminals. Was too clunky.

P10 Wasn't a great presentation by SEO.

P14 What's available in any system differs a lot, Columbus, Cincinnati, and Cleveland have a lot, other libraries may not have so much.

P9 Legislature is very high on libraries sharing resources.

**FACILITATOR: Does OLS MORE carry weight?**

P13 Negative weight.

P12 Negative is because it never worked right.

P13 Same.

P10 We haven't had a bad experience. If OCLC PICA works as they say – it is slick, but we don't have it.

**FACILITATOR: Should there be an OLS MORE in the future?**

\*P4 Does anyone know, the State Library of Ohio, what consortia are out there?

**FACILITATOR: What's the delivery time in your non-MORE sharing system?**

P14 Delivery time varies. Up to 3 business days.

P2 Usually next day but we have our own delivery staff.

P3 If status is on shelf,

P5 Within our county 1-2 business days.

P7 Don't know – need to ask the staff member who handles. Within county,

P9 1-2 days within county.

P10 We get delivery once a day at main library but delivery to branches is every other day.

P11 Within our consortium 2-3 days.

P13 Usually 2-3 days.

P5 Doesn't necessarily need to be branded as OLS MORE – all our patrons need to know is "can they get a book".

- **To what extent are you willing to participate in the Next Generation of SWRS?**

P10 Will it be better than the current option?

P11 Whoever participates now will probably be willing to migrate but if the functionality isn't there, they'll drop out.

**FACILITATOR: Any parting shots?**

P12 There are ILS systems now that are building systems that look the same with great functionality but the backend isn't necessarily the same.

P8 Can that do the "find & get"?

P12 Yes. Right now it is in evolution.

P13 It works with all our III libraries.

P8 Would it work with non-III libraries?

P13 Yes.

P1 We do need to come up with a solution. We're one of the richest library states – we should marshal our resources to do this. The function of the State Library of Ohio is to spearhead this project and search for a solution.

P14 This doesn't really seem like beginning of OPLIN. Not as exciting but still extremely important.