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## Reflections from Menucha

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# Reflections from Menucha

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Librarians from across Oregon and Washington gathered on October 23 and 24, 2008, in the beautiful autumn sunshine at the Menucha Retreat and Conference Center for the ACRL Oregon/Washington fall conference. The theme, “The Once and Future Catalog,” offered insight into exciting possibilities for next-generation library catalogs, as well as discussion of issues to consider and obstacles to overcome. Speakers from around the Northwest and across the country discussed their experiences with cutting-edge library catalogs, including:

- Kristin Antelman, Associate Director for the Digital Library at North Carolina State University (NCSU) Libraries, presented the NCSU Endeca-based library catalog and the Triangle Research Libraries Network (TRLN) consortial catalog.
- Tim Daniels, formerly the PINES Program Manager with the Georgia Public Library Service (GPLS), discussed the Evergreen-based PINES system.
- Terry Reese, Digital Production Unit Head at Oregon State University, addressed regional opportunities for next-generation library catalogs.
- Steve Shadle, Serials Access Librarian; Anne-Marie Davis, Reference Librarian/Collection Development Coordinator; and Kathleen Collins, Reference and Instruction Librarian from the University of Washington (UW) Libraries discussed implementation and public services issues with WorldCat Local.

Several themes emerged from the conference session and invigorating discussions.

## **It’s all about the user.**

A fundamental concern for user needs and preferences was a common thread. The WorldCat Local panel stated at the beginning of their presentation that ultimately, it’s all about the user; later they discussed their adoption of the Google mantra, “trust the user.” Terry Reese focused on the need for one interface per user, meaning that each user could customize the catalog interface to his/her own preferences. He also energized the audience by suggesting that the OPAC should be the least used interface, questioning why users should need to leave their own familiar online environments and come to our system to find information. Kristin Antelman’s and Tim Daniels’ presentations also addressed seeking user input and gaining user buy-in during the planning process for their new systems. From these presentations, it became clear that user needs should be central to the planning process for next-generation library catalogs.

## **Considering all the options.**

The speakers stated that they investigated various products before determining which option would best meet their needs. Each institution’s choice reflected their main priority for system functionality: discovery (search interface) or fulfillment (delivery system). NCSU and GPLS prioritized discovery, choosing Endeca and Evergreen for their user-friendly interfaces. UW considered Endeca and Encore, which offer better discovery, but ultimately selected WorldCat Local for its fulfillment system.

Terry Reese made an interesting observation that “search is easy; discovery is hard.” If you give a user a search box, they will find something. But will they find the best or the most relevant search results? The chal-



lence of next-generation library catalog systems is to optimize discovery, to have a robust system on the back end that can connect users to the information they need while offering an intuitive interface that any user can easily navigate.

### **Streamlined decision-making.**

Kristin Antelman, Tim Daniels, and the UW panel discussed the importance of a streamlined and efficient implementation team in order to complete the project quickly. Kristin Antelman commented that if they had involved all potential stakeholders, they would still be talking about the project years later, rather than having accomplished it. In addition, the project needs sufficient support resources, including staff and funding. Another key element in the success of the NCSU and PINES catalogs was the use of project managers who oversaw and directed the implementation process. A small, well-organized and adequately-supported implementation team helped these projects to achieve their goals quickly.

### **Communication is key.**

Speakers acknowledged that communication, both during and after a project's implementation, is crucial to its success. Library staff and patrons need to be kept up to date about implementation timelines and ongoing improvements to the system. Additionally, all users should have the opportunity to provide feedback or to report problems with the system. Tim Daniels discussed GPLS' outreach to member libraries, which resulted in a collective sense of ownership and pride in their library catalog. UW librarians learned from their experience that communication is vital to positive staff perception of the project. Lack of communication can leave staff feeling like their input is not valued and might cause negative perceptions of the system that linger after the implementation.

### **Collaboration.**

Now more than ever, collaboration within our own libraries and among regional partners is vital to success, not only of library catalogs but of many library services. The GPLS system provided a model of collaboration; their 275 member libraries participate in the system at no cost to the member libraries. Their catalog is centrally administered, and a statewide library card allows users to check out and request materials from any member library across the state. NCSU also lauded their TRLN consortial catalog, which allows users to receive items from participating libraries within one day of the request. The geographic proximity of their libraries makes this arrangement more feasible.

UW noted user demand for materials from other libraries increased dramatically after they adopted WorldCat Local. Summit borrowing increased 59 percent, and interlibrary loan borrowing increased 101 percent. As patrons use more materials owned by other libraries, the need for each individual library to own every book is reduced, opening the door to cooperative collection development. Building collections cooperatively with regional partners will allow libraries to reduce duplication in their collections and free their limited resources to purchase unique materials that benefit the entire consortium.

Collaboration needs to happen to a much greater degree, according to Terry Reese. He predicted the end of the local integrated library system (ILS), and suggested that the ILS will move to the network level. A network-level ILS would be centrally administered, either by a consortium or a vendor. Participating libraries could utilize the full functionality of the ILS without the responsibility for maintaining the system, thereby reducing costs and duplication in staff time and expertise among libraries. For users, a move to the network level



would provide a consistent catalog interface across multiple libraries and might lead to a statewide library card program similar to the Georgia Public Library Service.

**Persistence.**

Persistence was a key factor in the success of all the projects. Terry Reese stated it best by asserting, “We succeed by committing to a solution and making it work.” The speakers noted that their projects were accomplished through hard work and dedication on the part of their project teams, who overcame the obstacles, implemented the system, and persisted after the implementation to troubleshoot issues and make the system a success.

**Usability (or, it really is all about the users).**

Usability, for patrons and for library staff, was a theme throughout the conference. Once libraries have implemented the new system, how do they determine if it meets their goals? Can users efficiently use the system to locate and borrow materials? GPLS created a new position focused on usability; this person will be responsible for conducting usability tests with staff and patrons at member libraries. NCSU conducted focus groups which shaped the development of the TRLN system; Kristin Antelman noted, “too often, our opinions are arbitrary and driven by the people involved.” Usability



“...too often, our opinions are arbitrary and driven by the people involved.”

—Kristin Antelman,  
Keynote speaker,  
ACRL Menucha 2008

tests gather feedback from our core users to ensure that our decisions meet their needs and expectations.

UW implemented WorldCat Local with the idea that if it didn’t work for their users, they would turn it off, despite the significant investment of time and resources. Another WorldCat Local library did exactly that. The Peninsula Library system in California was another early WorldCat Local adopter; however they turned off WorldCat Local almost immediately due to user complaints about their inability to limit a search to a specific branch library. Although UW’s WorldCat Local has this same limitation, they have overcome this issue by maintaining two separate library catalogs: the former Innovative Interfaces library catalog, which offers more advanced search functionality, as well as WorldCat Local.

User feedback about UW’s WorldCat Local catalog was primarily positive; negative feedback usually focused on specific problems rather than broader complaints. UW also made an interesting distinction between the types of negative complaints that they received: they classified the issues as transitional (a result of users’ learning curve with the new system), or functional (actual problems with the system). Not all complaints indicate that something is wrong with the system; instead some offer a teachable moment in which users can be taught how to efficiently utilize the new system.


After the implementation, and ideally on an ongoing basis, libraries need to ask their users if the system is working for them and how it can be improved. Users, expectations, and research methods change; the library catalog (or any other system) needs to be responsive to this changing environment and continue to adapt to users’ shifting needs and preferences.

Throughout the conference, speakers energized and engaged the audience by encouraging us to think imaginatively



about what the library catalog could be. How can we jazz up the catalog interface and offer features that our users expect and utilize in other online applications? How can the back end of the system offer better functionality for fulfillment and delivery of materials? How can we incorporate the lessons learned from conference speakers. These lessons are:

- investigate all of our options
- identify our project goals
- appoint streamlined implementation teams
- seek input and gain buy-in from our users
- establish clear communication methods for reporting successes as well as problems
- collaborate with regional libraries
- be persistent on our path to success
- remember, throughout the process, to keep our focus on the user.

This conference provided a great start to the conversation on how our individual libraries and our regional consortium can shape the future of library catalogs. 

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