



Lincoln County Library District

ILS Feasibility Study Report Volume 2: Results of Surveys and Focus Groups

Carson Block Consulting, Inc.



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1. Summary

This document compiles the full results of the surveys and focus groups performed during the ILS assessment. They are presented in chronological order.

- The results of the **Consortium Interest Survey** begin on page 12.
- The **Focus Group Report** begins on page 19
- The full results of the **Consortium Needs and Wants Survey** begin on page 35.

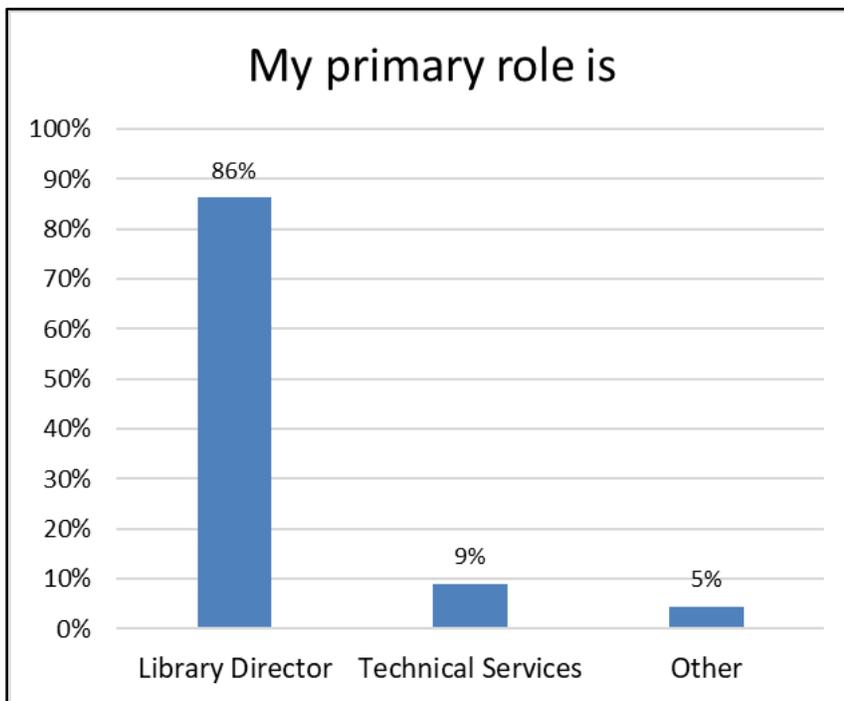
Consortium Interest Survey (January-February 2022)

2. Introduction (Survey #1)

From January 20, 2022, to February 2, 2022, Carson Block Consulting, Inc. conducted a survey to the Advisory Board of the LCLD ILS Feasibility Study. Twenty (20) libraries were invited to participate in the survey. There was a 100% rate of response among participating library staff.

Below you will find a summary of all questions. Open-ended questions will be summarized by supporting and concerned comments, edited to avoid identifying details.

2.1. My primary role is...



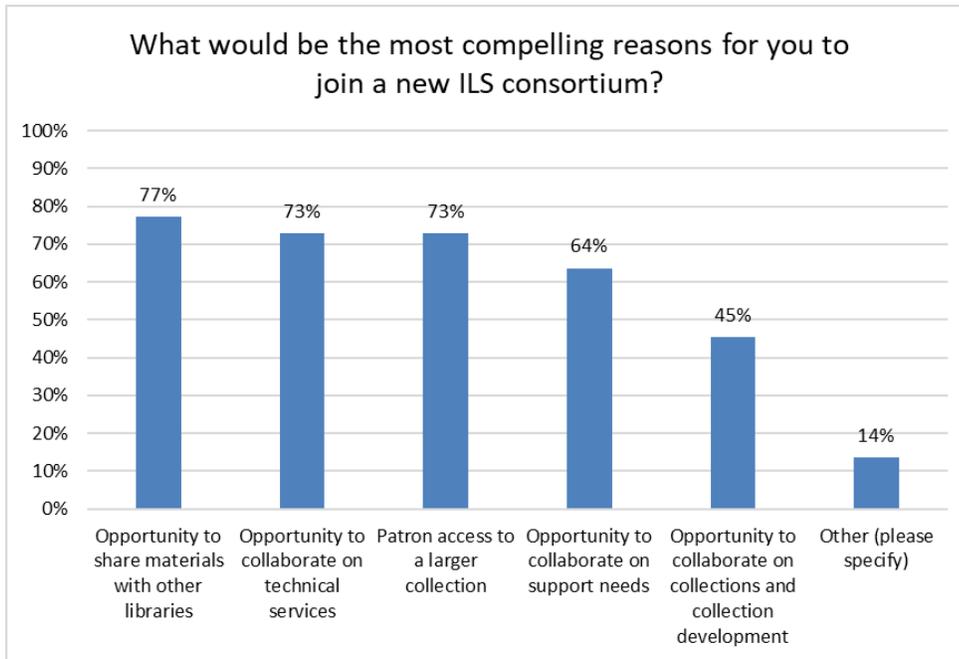
Other

- Manager

2.2. Contact Information

Omitted here for respondent privacy.

2.3. What would be the most compelling reasons for you to join a new ILS consortium? (Select all that apply)



Other:

- Bring the district back together.
- better service to [our] patrons
- Build scale to support infrastructure like courier and other shared services.

2.4. What are your greatest concerns about joining a new ILS consortium?

This question received 15 responses. Eight responses cited cost or expense as being of primary concern. Other concerns expressed in the responses include:

- Taking up staff time or adding duties that don't currently exist to staff workloads
- Apprehension about the process of setting up and expanding the consortium
- The decision-making process becoming more complicated with a larger group
- Negotiating relationships not only with other libraries that might be part of the new consortium, but with staff, patrons, and local governments
- Availability of materials for local use
- Maintaining cataloging standards across the entire consortium

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2.5. What do you feel are the strongest benefits of joining a new ILS consortium?

There were 15 responses to this question. The primary benefit noted was expanding the materials available to local patrons.

Other benefits of joining a new ILS consortium include:

- Shared technology (ILS and backend systems) support
- Collaboration between participating libraries on collection development, training, and technical services
- Easy for patrons to use libraries in multiple locations
- Consortial support and cost sharing for the ILS

2.6. What would be a deal-killer?

There were 13 responses to this question. Two respondents noted they didn't know if there was a deal-killer for this proposal, and another commented they didn't think there was one. The primary deal-killer noted by over half the respondents was a high, unpredictable, or unfair cost to individual libraries.

Other deal-killers noted include:

- Very long transit times
- If the ILS was less functional than what they currently have or if the new ILS was poorly supported
- If the final plan for the consortium was not detailed
- If the consortium resulted in a lack of flexibility and functionality
- A lack of dedicated staff to make the new system work
- Losing control and oversight of their own processes

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2.8. What are your thoughts about possible consortium costs (e.g., is there a price or a price range that is particularly attractive to you as a possible consortium member)?

There were 12 responses to this question, with only 6 mentioning a specific dollar value. The other six shared no amount, but two respondents mentioned they would not like to pay more than what they currently pay for ILS services.

Dollar values mentioned:

- Under \$5,000 annually: 2
- Between \$5,000 and \$20,000 annually: 2
- Over \$20,000 annually: 3

2.9. What is the greatest benefit you could receive from a new ILS consortium?

There were 14 responses to this question, the most frequent response was to increase the availability of products and services for patrons.

Other greatest benefits noted:

- ILS management and the possibility of hiring a dedicated ILS manager
- Collaboration with other libraries in the consortium
- Reuniting previously connected libraries
- Potential cost savings
- Eliminating ILL requests from nearby libraries

2.10. What are the greatest things you can offer a new ILS consortium?

There were 13 responses to this question. The most frequent response was the collection their library offers, either special collections or well-rounded general collections that see high circulation and patron satisfaction.

Other offerings to a new ILS consortium include:

- Insight and innovation of new ideas and plans
- Various staff members with specialized knowledge or interests (technology, staff management, cataloging)

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2.11. Please tell us about your current courier services - who provides the service, who you share with/geographic coverage, the performance of the courier, and any other helpful information.

There were 15 responses to this question. One respondent said they do not have a courier.

Performance by courier:

- LCLD - Seems to work well
- LCLD - Reliable but with a few hiccups
- Coos County - Operates 6 days a week, links with Curry County two times a week
- Coos Libraries Extended Services Office (unsure if same as previous) - Difficult time retaining employees in the last couple of years
- Curry County Library Foundation - Contracted courier for delivery two times a week, also delivers items to Coos County
- In-house courier - Monday, Wednesday, and Friday
- Orbis-Cascade - ILL and intrasystem transfers

2.12. Please share the names of any consortiums that you're aware of that you feel are particularly successful - or unsuccessful – and why.

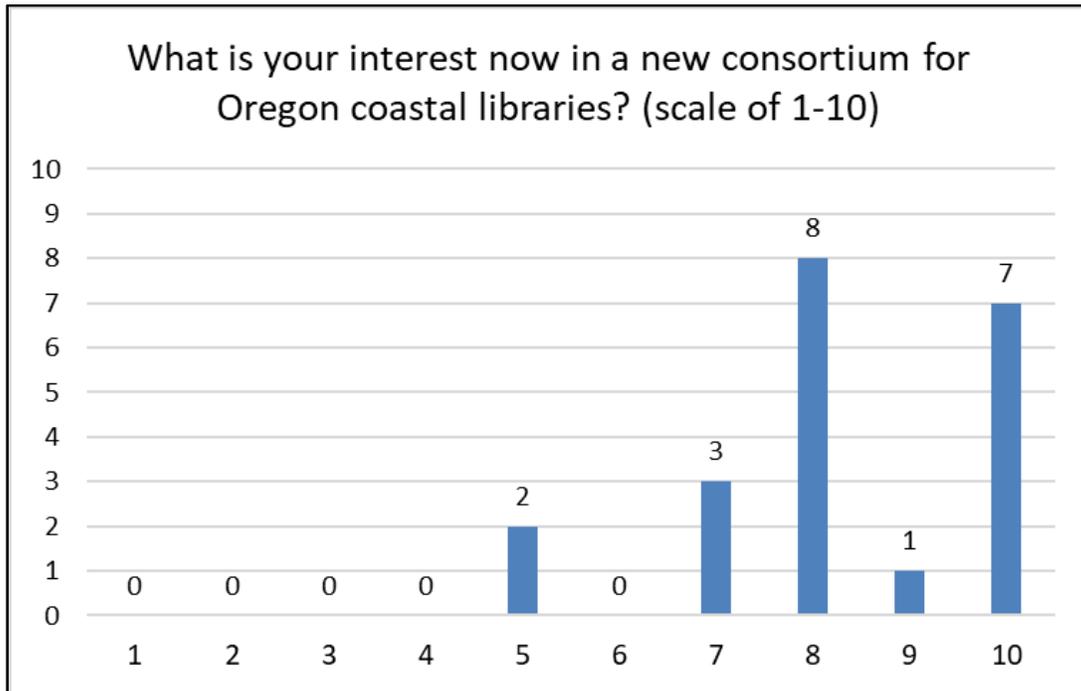
There were 9 responses to this question. Chinook Library Network was mentioned as cost-effective and appropriate for the area it serves, and that they use Koha. The Northwest Library Cooperative was cited as an “informal library district” that has been successfully created by neighboring cities.

Academic libraries mentioned the Oregon Community College Libraries Consortium, the Linn Libraries Consortium, and the Orbis Cascade Alliance.

Outside of the state, MOBIUS in Missouri, the Montana Shared Catalog, and WCLS (though the acronym was not expanded, it is presumed to be Whatcom County Library System in northern Washington State) were mentioned as library groups respondents were aware of or had heard good things about.

2.14. What is your interest now in a new consortium for Oregon coastal libraries? (scale of 1-10)

AVERAGE INTEREST SCORE: 8.2



Focus Groups Report

3. Introduction (Focus Groups)

Carson Block visited the Oregon coast to host two focus groups. The intent of both focus groups was to gather thoughts and sentiments about the possible formation of an Oregon coastal library consortium and potential services that library leaders would look for in a potential consortium.

The focus groups were hybrid in mode, with both in-person participants and participants who joined remotely. Both meetings were successful and had both in-person and remote participants taking active part in discussions.

The first focus group took place at Driftwood Public Library on June 6, 2022, from 1pm - 4pm. The second took place at Port Orford District Library on June 8, 2022, from 9am - 12pm.

4. Topic Outline

1. Survey results - observations and questions (very brief)
2. Overview of Discussion and Activities (very brief)
3. Topic 1: ILS Features (very brief - and will help orient the group around our topic)
4. Topic 2: Resource Sharing
5. Topic 3: Consortium Structure Options
6. Adjourn



5. Driftwood Focus Group

5.1. Attendees

| Live | Remote |
|---|--|
| <ul style="list-style-type: none"> • Clare Sobotka (Tillamook Bay Community College) • Jane Cothron (Lincoln County Library District) • Kirsten Brodbeck-Kenney (Driftwood Public Library) • Lillian Curanzy (Newport Public Library) • Dan McClure (Clatsop Community College) • MaryKay Dahlgreen (Lincoln County Library District) | <ul style="list-style-type: none"> • Bill Landau (Tillamook County Library) • Deborah Trusty (Toledo Public Library) • Darci Adolf (Oregon Coast Community College) |

5.2. Topic 1: ILS Features

Question A: What ILS functions or features are the most important to you from a Patron perspective?

- Notices to communicate with patrons automatically -- overdues, hold pickups, library card expiration, programs they might like, etc.
- Easy finding items online, place holds, find their locations, and find out if those items are related to other items
 - Clarity from patron perspective - when they look it up, they understand what's connected - and clarity of account access online as well
- Availability of a "true browse" experience online
- Good smartphone interface - where patrons are meeting the library online
- Great searching features
- Ability to narrow searches - e.g., searching one branch only. Important as consortium expands
- Changeable interface for different libraries - e.g., community college libraries vs public libraries (different functions)

Question B: What ILS functions or features are the most important to you from a Staff perspective?

- Really great support and training
- Easier Documentation/reporting
 - Statistical reporting needs to be easy
- Obvious and easy interface - e.g., don't have to search through pages to find what you're looking for (sidebars on Koha to look at features)

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- Modules for the major functional areas (Cataloging, Circulation, etc.) - no one uses Koha's Acquisitions module because it's not easy
 - And want them to WORK
 - Want Circulation to be so intuitive "that even the library director can step out ... and easily be able to renew someone's library card or figure out their \$5 fine and take the money and document it"
- Support - someone to help build reports from scratch
- Ability to modify "friendliness" or "professional" level of communication - e.g., sending someone a third notice for payment don't necessarily want it to be happy-friendly type language
- Better search on staff side - often use patron-side to search rather than staff-side because staff-side is not as good
 - Better restriction - local collections, Library of Things items and digital collections that can't be available to the consortium
- Easily being able to customize display of open/closed hours, notices that go out, etc. with the option to do it in-house or have someone offsite do it
 - Shared calendar in the consortium to communicate with other libraries are doing without having to send out emails - esp. Courier not running, staff day closures, etc.
- Nice to have: don't have integrated student registration/tracking system - students at the CC have to have a second ID card for the library
 - A system that has it - seems like the computer science people have to reinvent the wheel every time they do it - even though it's done 5 times every term
- Authority control system that is easy - and have changes discussed before they're implemented and people making those changes be trained
- Need a "cludge factor" to invent things that don't exist yet

Question C: What would you like to see in terms of "Discovery" ?

- (See some answers in Question A)
- FRBR grouping display - displays all formats on a title that is being searched for (digital, book, audiobook? Maybe video too)
 - Fuzzy logic would be necessary
- Keyword and more structured hierarchical search - want to be able to have those searches flow together somehow - better logic for searching than most ILS have
- Don't want to see all electronic book holdings patrons can't access (e.g., elect not to have JSTOR display in search results)
 - Koha displays everything with a MARC record
 - Carson: Order list stress factors - need it now, be able to access it, etc.
- As long as it's clear for the patrons what format/location an item is
- Not crucial but nice, integration with Novelist - recommendation for similar books
 - Not perfect but shows next books in the series, other books by the author, etc.
- Clarity about *how* an ebook is available - is very confusing sometimes

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- Can be disappointing for those searching to see what other libraries have available but not to a smaller library/system - e.g., keep all digital resources out of the catalog
- Carson: that touches on the equity of offering of digital content - consortium can also assist with group purchasing and distributing to all members
 - Example given was paying for digital content by number of full-time equivalent students, and not sure could afford to contribute to more or share their collection
 - Considerable buying power with many libraries - key is to find platforms that are useful to all members – community colleges might be outliers, content-wise
 - Mary Kay: May be a political more than technical issue - how do we make those decisions part of the agreement - not enough to just share the catalog, but have to make some efforts to create equity in terms of materials and access
 - Possibility of hiring a Systems Manager - would be comfortable putting that in a consortium agreement
 - Experienced an ILS feature that has “zones” to help with borrowing abilities
- Patrons have asked and they sort of have it - creating a “wish list” - it’s multi-step and not widely used

5.3. Topic 2: Resource Sharing

Question A: What collection sharing model should a possible consortium consider? How can the ILS Support the model?

- Want patrons to be able to see clearly what they can and can’t check out
- Want the library to be able to restrict items they need to restrict
 - Having items on order and their hold queue be visible to other libraries might be useful as well
 - Carson: Ancillary topic brought up is “sharing best practices” - a powerful part of this discussion
 - Need to keep some items totally private - Chromebooks and other “techy” things don’t want made available to other libraries - create subgroups that others don’t see
 - Carson: Local and available - useful for items in high demand at certain times or things that are heavily needed locally
 - Argument for making things locally available still visible - people travel to different libraries to use items, and if they aren’t made aware they’re available to use locally that’s a disservice
 - Desire for embargo periods on new items (by library staff) - prefer to have a consortium with universal agreement on those lending policies and not piecemeal policies
 - Automate the back end on this would be ideal to keep things simple for catalogers and librarians
- Display time limits of availability
- Good geographic prioritization on holds - especially in a large consortium - zones
 - Seems like a waste of gas and other resources to be inefficient with this

Question B: What services should a possible new consortium provide? (e.g., Technical Services, collection development, digital cultural heritage resources, training, technology support, etc.).

- Database cleanup
- Agreed-upon sharing standards as part of the consortium agreement - and a path to resolution for disagreements
 - Series purchasing, numbers of new items to purchase, etc. - e.g., don't need three copies of a very niche biography in the whole consortium, maybe 2 will do
- Aspiration: A shared pool for a floating collection among the consortium members
 - Carson: Creating a collection that's meant to be culled after a certain amount of time -
- Special collections in different libraries (e.g., graphic novels at Driftwood) are strengths and being able to share those materials more freely is good
- Love sharing programming costs with other libraries and sharing staff training with other libraries - lots of opportunities to share costs for those in the future as well
 - Carson: set the stage for collaboration that's not related to the ILS but to library needs
- Having a point person to go to with questions who has the documentation to support staffing positions, paperwork, and training.
 - Carson: Consortium cataloging and technical services, but also heard documentation around workflows involved in doing things
 - So much institutional knowledge stored in just a few people

Question C: Describe your desires for Courier Service as part of any possible new consortium.

- Route difficulties (tunnel collapsing, roads flooding, etc.) - so maybe a boat or helicopter?
- Figuring out how to balance usage vs. the cost is going to be the key
 - E.g., difference of volume on public library vs. academic library crates
- Efficiency and tracking of items - previous experience in a consortium had a lot of items missing in transit (more libraries) - unsure where the breakdown in organization is
 - Carson: So, courier management and accountability
- What kind of timeline are we willing to live with?
- Some libraries have RFID, and some don't - the sorting is easier in some ways with RFID (and automated sorting machines)
 - Carson: Could have RFID standardization as part of the grant plan/funding - might be smart or might be a lot of money that doesn't need to be spent

Other Resource sharing thoughts?

- None

5.4. Topic 3: Consortium Structure Options

Question A: Separate Entity or Hosted by one library/ library system?

- Carson: Hosting in this case means the physical space where the consortium has its business center (services may be hosted physically or on the cloud, but where the people are)
- Important to have a central office not affiliated with any particular library - unintentional prioritization happens
 - E.g., Oceanbooks is currently hosted in Tillamook and when Tillamook's levy comes up for vote there's the question of what happens to Oceanbooks if the levy isn't passed
- Need to make sure there is not imbalance of voting or decision making power
- Important to have a detailed understanding of what the consortium IS (an IGA and a business arrangement needs to be spelled out)
 - Carson: Nothing wrong with a pre-nup!

Question B: Thoughts on Governance Structure?

- Want to make sure there is no "sleeping elephant" - afraid it'll roll over and kill you
- Also worry about being held back - e.g., by smaller libraries without the funding for a "Cadillac" ILS or one library's ability to innovate being held back by the funding concerns of smaller libraries
 - Carson: It is folly to not recognize different needs of different members - from "lights on" needs to "innovate and lead" needs
- Mary Kay: Because of the variety of libraries involved will have to be creative - having a tiered system is something that we would need to have - tiered for needs and not for wants
 - E.g., have a subset of members that pay a lower fee and have different voting status - "Full" and "Associate" members
 - Will need to be some creative thinking
- Question: Could the different levels utilize Discovery layers - e.g., "Full" members have a "Cadillac" Discovery layer and "Associate" members have a different one their dues don't support
 - Carson: That could be done, never heard of it done
- Biggest concern is the effect on the patrons if things dissolve
 - Carson: Maybe something that expresses that the patrons/students/users are the reason that this consortium would exist, and all decisions are measured with their good in mind
- Have an exit strategy outlined in the governance structure -

Question C: Thoughts on Staffing Structure?

- [Addressed in other questions]

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Question D: Thoughts on Funding Structure?

- Curious about the funding for a dedicated staff member to run the consortium
- LSTA funding - need to look at it in terms of implementation funds, not stability
- Membership fees to fund the consortium
 - Need to have tiered or opt-in services to pay for - for a small library with little staff a big value in the consortium is in getting that help on ILS and background stuff and freeing library staff to do patron-focused stuff
 - Carson: Like a minimum “stack” of services - essential ILS, Discovery layer, courier, and then maybe an optional menu of things above that - collaborative collection development that may not be as needed
 - Option to opt-in and pay a little extra for exciting projects would be nice (requires planning and communication)
- Need predictability and transparency on fees and funding and plan for increases

Question E: Thoughts on Fee structure for participants?

- [Addressed in other questions]

Other thoughts?

- Hoping there are ways besides a courier to distribute items - books by mail, or other methods of sending items from place to place

5.5. What are your takeaways from today?

- Carson: It’s a silly assumption that this is just a technology/ILS thing - there’s far more to it
- Everyone is kind of on the same page, and have the same concerns
- Need to think about how all the libraries up and down the coast will meet regularly to hash things out and maintain upkeep
- Very hopeful this will move forward and we’re able to get support from the state - lots of great people together in one place and hope to afford to be a part of it
- Encouraging to know that everyone is being honest about their concerns and their needs - think this discussion moves us along in “comfort mode” rather than “panic mode”
- Excited about his this can serve patron needs - should be a baked in understanding that the larger libraries might have to support smaller libraries to allow them to participate in this project
- Any benefit to doing a survey of shared collection materials - or lack thereof - to understand the degree of increased available materials patrons would have access to
 - E.g., This consortium has access to “# of unique items”
- Want this to work and want it to work well (and learn from mistakes of orgs past)
- Appreciate learning more about different types of libraries
- Have hope that because everyone is being honest can put together something that is functional in the long run
- Staying open - like the idea of community and even though there are different types of libraries with different missions, “what am I getting out of it?” is not the *only* consideration



6. Port Orford Focus Group

6.1. Attendees

| Live | Remote |
|--|--|
| <ul style="list-style-type: none"> ● Alex Kuestner (Lower Umpqua Library District) ● Haley Lagasse (North Bend Public Library) ● Jeremy Skinner (Curry Public Library) ● Denise Willms (Port Orford District Library) ● MaryKay Dahlgreen (Lincoln County Library District) | <ul style="list-style-type: none"> ● Jane Cothron (Lincoln County Library District) ● Sue Bennett (Waldport Public Library) ● Sami Pearson (Coos Bay Public Library) ● Stacey Nix (Coos County Library Service District) |

6.2. Topic 1: ILS Features

Question A: What ILS functions or features are the most important to you from a Patron perspective?

- Manage their holds - easily log into online account using card info and/or a password/PIN; can search for items and clearly see the status of the item and how long it will take to get it; able to place items on reserve, pause holds until they're wanted, cancel holds, get notified when holds come in.
 - Carson: Self-service holds from A-Z
- Catalog interface that shows where things are and shows all formats of the title available - CDs, paperback, hardback, etc.
 - Streamlined, intuitive
 - Carson: Tunable/Tenable
 - Integrate digital collections, displayed individually by library for licensing restrictions
 - Google-ish searching
- If multiple libraries are not offering the same materials as the others in the consortium it's important for patrons to know what they can access
- Reading history - account based - ability to turn it on/off - export/import from other sources
- Text notifications really need to happen at some point
- Clear communication of due dates (e.g., patrons renewing items next day and thinking that'll extend it past the original due date)

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Question B: What ILS functions or features are the most important to you from a Staff perspective?

- Reliability - backups and being able to access databases - changes are updated in real time and they stick
- ILS functions as intended so search results are accurate across platforms - some integration issues causing staff side to give different search results than patron side
- Tracking of licensing for software on computers
- Powerful and extensive search capabilities - able to display facets so staff can narrow down their own searches
- Dedicated ILS administrator that will make changes and maintain functionality of the ILS
 - Needs to be able to change things for individual libraries without changing for every library if that change is not wanted
- Reporting and statistical information - accurate - easy and in as few places as possible
- Wish lists for what patrons want to read in the future

Question C: What would you like to see in terms of “Discovery” ?

- Ability to individualize so that local library websites look like their local library’s website - their logo, color scheme, items, staff picks, etc.
 - Will still see the wide catalog of available items but the webpage will look like their own
 - Branding
- Integrate with digital content and show the digital collection
- Good to have a developer who can make Discovery as good as it can be
- Want staff Discovery to be as good as patron Discovery
- Customizable at a local level
- Recommendations - relevant and available at the library/in the system - showing home library first
 - Carson: What’s really available is so important to libraries
- Ability to purchase items that are in high demand

6.3. Topic 2: Resource Sharing

Question A: What collection sharing model should a possible consortium consider? How can the ILS Support the model?

- When a patron wants to place a hold, it should show immediately local options first before expanding the search to a wider area
 - Maybe have patrons speak to librarians to put “wider” holds on items - almost preferable to tell patrons “not available in your local area, please talk to your librarian about holding from a larger area”
 - Several participants think this will stop patron holds in their tracks

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- ILS functionality could be out there smart enough to place holds based on given parameters
 - Hawaii had a system similar, with option for staff override of the automatic system
- Could have a “Lucky Day”-type collection that is first come first serve and exempt from holds
- Centralized repository that would hold popular items to go directly out from those points rather than from individual libraries
 - E.g., whole system owns 100 copies of the new James Patterson and some “live” at various libraries but there’s also a number housed at a central location
- Need to consider how fast different patron groups will place holds - tech-savvy people will place holds fast and furious and less-tech-savvy people won’t and need to balance that somehow, so the less-tech-savvy still get an opportunity at their local materials before they’re shipped off elsewhere
- Possible policy: Any book you buy a single copy needs to be available to the whole collection, but if there is a second copy of it that should be able to be local-only

Question B: What services should a possible new consortium provide (e.g., Technical Services, collection development, digital cultural heritage resources, training, technology support, etc.).

- Carson: Already mentioned ILS administrator or if there’s open-source facets an open-source development administrator, a “discovery” tuner, reports and reporting help, administering a central location collection
- Consistent training - not only everyone does it but frequency
 - Training for catalogers - centralized training for those maintaining the catalog
 - Support training in cataloging and collection development on foreign language materials that smaller libraries don’t necessarily have the expertise to handle
 - Question: need a cataloger at every single library? Opportunity to use economy of scale to re-route some staff time to other tasks
 - Several smaller libraries have fewer than 1 FTE - probably they are very eager to give up the added job of cataloging (as long as the cost isn’t out of their reach)
 - Can offer different levels of this - e.g., adding local call numbers on site but all the rest of cataloging was done off site
 - Cataloging issue - adding items that don’t have easy to source records and making the records standardized
- Technical support - ability to do tweaks to systems that need them
 - Carson clarifies: only tech support for the ILS
- Contact person for each library for collection development alerts
- Having a group to discuss collection development policies and management - to ensure consistency and quality of materials
 - Make sure policies and procedures are complimentary
- Authority control at a systems level
 - Control downloaded fields from OCLC for records
 - Doing global switches (e.g., subject: Vietnam War) when updates happen

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- A person who can tell libraries what parts of the Discovery layer they can change to personalize it for their library and have an easy way to do it - a guide to personalize the Discovery layer
- Reason for a central storage of available materials could include high value items that libraries don't have the space for but are too valuable to be weeded
 - Special collections like holiday books
 - Old political books as well - still relevant but not as in demand (and important to keep in collection for knowledge)
- Concern about the amount of work to change all catalogs to be the same under the consortium's ILS
- Carson: The idea of looking at workflows is a good one
 - MaryKay: The idea of "zoning" things in terms of cataloging, courier, collection development is a really useful spark that Carson needs to pursue as he's doing his report
 - Connected zones - structure courier so things are more compact
 - MaryKay: Needs a step back towards starting over so it looks at everything as a whole system to build from the beginning rather than adding this or that to existing structures

Question C: Describe your desires for Courier Service as part of any possible new consortium.

- See Question B for some answers
- Reliable
- Not efficient to have a courier for the whole network take over for Coos County
 - Carson: Baseline assumption is not to start from scratch - to keep things that are working and just add on additional services
 - Something to bring on from the larger network is to expand staffing for the courier - if a driver for a small system can't be there it gets tricky - obviously might need to expand and have more than one driver but potentially have staff trainings and consistency and overlap for drivers
- Want to see an analysis on material handling to make sure handling and shipping things in an efficient manner
- Might want to think about less common shipping methods - use postal service with library rate for more out of the way places without regular needs
 - MaryKay wants a Boat-Book-mobile
 - Have paying customers on the book boat

Other Resource sharing thoughts?

- [none]

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6.4. Topic 3: Consortium Structure Options

Question A: Separate Entity or Hosted by one library/ library system?

- Experience with a separate entity org - each library was an individual library, but the system was an “umbrella”
 - Handled ILS, technical stuff, technical help, some cataloging help
 - Was better because the entity wasn’t beholden to a single library but all of them
 - All libraries had one vote
- Support for separate entity model
 - A larger library with more capacity could be a City entity and beholden to their elected officials, and a special district in that City gets convoluted really fast
 - Coos County Extended Technical services is almost like that separate entity for Coos County - decisions are made through the county (though have to follow “home” rules of Coos Bay for physical considerations)

Question B: Thoughts on Governance Structure?

- Important to make decisions on simple majority - lots of orgs have gotten “really stuck” on decision making (particularly around fines free movements) because the org is reliant on consensus rather than majority
 - Also write into bylaws that *some* decisions may require consensus
- Should be 501c3
 - Would help with grants
- 2 Tiers of systems.
 - Example:
 - Public libraries
 - School libraries - use the catalog but don’t participate in some meetings and don’t vote
 - Carson: This could respect the fact that some libraries are “movers and shakers”, and some are “keep the lights on”
 - Has to be a way to get information from everyone for several kinds of decisions - formalized
 - 2nd tier would be almost sponsored by other libraries
 - Expectation to communicate as part of the membership of the system
- Need guidelines around who will represent the libraries

Question C: Thoughts on Staffing Structure?

- Need to have someone to handle:
 - Contracts
 - Accounts payable
 - 501c3 compliance
 - Communications

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- Some key functions would be unable to start without, some can be added as the consortium grows
 - Need to narrow down to what is absolutely crucial to get going
 - Some functions can be subcontracted out
 - Carson: My bias is that anything with local knowledge needs to be in-house, anything that is a commodity/can be bought - do so
 - Might be libraries within the system that can take on portions of those duties via contract
- Could bid on open-source help as a system

Question D: Thoughts on Funding Structure? Fee structure?

- Grants for start-up funding - continuation will need to be funded by membership fees
 - Pay Bywater support individually - would change if paid as a group
 - Can fund initial stuff with library membership fees
- Unsure how fees will be assessed
- Hypothetical:
 - Say the 501c3 cost was assessed to be \$5mil per year
 - Would like to have the ability for larger libraries/systems to absorb the fees from smaller libraries/systems if the smaller ones can't pay
- Does the fee system reflect the voting structure?
 - Can be two separate things, but need to define both systems
 - Need "100% consistent way to assess the fee" - proportionate by population served or similar
 - Some libraries may not be able to pay for any future increases at all
 - Economy of scale can help with this a lot - help serve the underserved communities

Question E: Thoughts on Fee structure for participants?

- See above

6.5. Other thoughts?

- 501c3 would insulate one library from limiting their collections - would give library directors a "little bit of a fall guy" and pre-done research to back up
 - Carson: Having a group of libraries say "these are professional standards" that can collectively have these discussions and shield individual libraries from content and collection challenges

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6.6. What are your takeaways from today?

- Lots of information for a lot of different groups that run things many different ways
- Doable thing - very feasible
 - Few things to work out (MOU, forming the 501c3, governance, courier stuff)
 - Would be a benefit
 - Would be nice to have 1 card on the coast (and a shared blacklist!) - lots of people travel up and down the coast and have library cards in many different towns
- Wish this had happened 2 years ago - logistics can be worked out but startup costs might be a big speedbump
- The discussion is good - some part of this is scalable for some part of the coast - can chunk the coast and apply these discussions/principles



Consortium Needs and Wants Survey (July-August 2022)



7. Introduction (Survey #2)

From July 19, 2022, to August 3, 2022, Carson Block Consulting, Inc. conducted a survey to discover the Integrated Library System (ILS) needs of Oregon coastal libraries. There was a 78% rate of response among participating library staff.

This survey was designed to discover two key areas of inquiry in various aspects of the ILS: a ranking of importance of each ILS aspect (often a functional feature of the ILS) and an assessment ranking of the performance of each aspect of the ILS. As well, additional questions about a possible consortium and its desired services were posed.

The data collected in this survey may be used as the basis for an RFP or RFQ for a consortium-level ILS system.

8. Methodology

Below you will find a summary of all survey questions. The survey was made up of 88 identified ILS functions, and respondents were asked to rate their importance to library functionality, and then to rate their satisfaction with the functions as provided by their ILS (176 ratings total). For questions relating to potential needs and wants of a future consortium, respondents rated 78 potential features. There were three open-ended questions included as well.

Answers to open-ended questions and comments were only edited to omit identifying information to preserve anonymity.

The consultants used percentages to show the ratio of importance to satisfaction because of the asymmetrical response rate of the two major sections of the report. The Importance of ILS Functions/Modules section garnered 16 full responses, while the Satisfaction with ILS Functions/Modules only garnered 12 full responses. This discrepancy in answers is understandable due to the length of the survey and priorities as libraries transition into a post-COVID world. The consultant feels that the responses are complete enough to be useful in painting a picture of importance and priorities of different aspects about the ILS and questions about a possible consortium.



9. Summary of Findings

- The **Quick Comparison of the top 20 ILS Functions and Performance Rankings** (page 42) indicate that the top 20 ILS features of survey respondents are:
 1. Holds management
 2. Ability for library staff to manage local settings such as library closed days, messaging, loan periods, etc.
 3. Ability to bring in records from other sources (e.g., OCLC)
 4. Web-based catalog that can be customized by each library system or location
 5. Routing/transit functions between library locations
 6. Customizable reports
 7. Responsive design for support across a variety of screen sizes
 8. Alerts for overdues and available holds
 9. Variety of patron notification options including email, text, and HTML formatting
 10. Alerts for overdues, fines, available holds, etc.
 11. Inventory support
 12. Place holds on physical & digital materials
 13. Patron account access with information about checkouts, history, holds & ILL information, etc.
 14. Data and transaction security at industry standards for patron information, searching the catalog, and other areas
 15. Ability to find and interact with content from digital collections (place holds, checkout, return) such as Overdrive, cloudLibrary, and Hoopla
 16. Reports on real-time data
 17. Patron edit options including PIN and address updates
 18. Integration with Overdrive, Hoopla, cloudLibrary, and other electronic materials collections
 19. Support for automatic renewal of materials
 20. Support for a variety of messaging formats: text (SMS), HTML, email, etc.
- Of the top 20 ILS features, respondents ranked the satisfaction in the mostly “middling” category, with most of the top 20 entries ranked as “moderate dissatisfaction” and only three entries “low dissatisfaction”, with none of the top 20 ILS features ranking with low, moderate, or high satisfaction.

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- The current satisfaction level of the top 20 important items to participants indicates general room for improvement in ILS performance.
- Charts showing the importance of each ILS feature and the current performance of each ILS feature (displayed to show the comparison between importance and performance), and comments from respondents are shown in the next sections of this report.
- Respondents were offered the opportunity to suggest features that were not listed.
 - Suggestions for patrons included use of zones to localize resource sharing of physical items; and the ability to request specific copies when placing holds; easy way to limit search results by language; and opportunities for purchase suggestions/patron suggestions.
 - Suggestions for library staff included an easy way to limit search results by language and a “fuzzy logic” search.
- “ILS Needs and Wants” were also in the survey. The list of items was suggested during the focus group sessions. Nearly all of the suggestions were ranked as “Highly Desirable” or “Desirable” by respondents:
 - Needs and wants arising from the question, "What ILS functions or features are the most important to you from a Patron perspective?"
 - Holds management across multiple systems
 - "Self-service holds from A-Z" - and cooperation with other systems
 - Easy catalog search capability across multiple systems and cooperation with other systems
 - Catalog interface that displays multiple formats available for one search - e.g., Hardback, paperback, digital, audiobook, etc. in one record
 - System would not display digital items the patron searching does not have access to
 - Ability to block select items from borrowing outside "home" library/library system
 - Reading history integrated with intra-system holds/borrowing - and the ability to turn it off
 - Wish list functionality for patrons with integration to whole system
 - Clear and consistent communication of due dates for patrons using consortium materials - distinct from "home" system communication

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- Needs and wants arising from the question, "What ILS functions or features are the most important to you from a Staff perspective?"
 - Full search integration across all platforms available
 - Easy and accurate reporting and statistical information in centralized location
 - Help building customized reports
 - Ability to customize communication with patrons based on severity (e.g., third notice language may be firmer than first notice language)
 - Shared calendar in the consortium to communicate events throughout without email blasts or notices from each library
 - Integrated student registration/tracking system for the Community College libraries
 - Need "kludge factor" to invent things that don't yet exist
- Needs and wants arising from the question, "What would you like to see in terms of "Discovery"?"
 - Customize library websites for individual display (logo, color scheme, staff picks, hours of operation, etc.) while still displaying the consortium search when needed
 - Different "looks" for the catalog for different types of libraries (e.g., Public, School, Community college, Special)
 - Patron and staff functionality in Discovery should be equal
 - Staff discovery should have better restriction options (e.g., local or special collections, digital vs. physical, as well as location-based)
 - Clear display of availability and proximity to patron placing the hold
 - Clear display of what digital platform a digital item is available on
 - Ability to narrow searches to one library/system
 - Ability to purchase items that are in high demand
 - Availability of a "browsing" experience online
 - Strong smartphone interface
 - Integration with Novelist or other service for recommendation of similar books, display of series or author information
- Resource sharing needs and wants arising from the question, "What collection sharing model should a possible consortium consider? How can the ILS Support the model?"
 - Local options should get priority over items further away
 - Ability to have a collection embargo period that doesn't circulate for "x" days/weeks but then is automatically updated when embargo period is finished

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- Ability to designate some items private to their home library/system (e.g., Chromebooks and other tech)
- Agreed upon list of "Sharing Best Practices" for discussion/refinement
- Centralized repository of popular items for distribution with libraries getting a designated number of copies to "live" there
- Possible policy: Any book you buy a single copy needs to be available to the whole collection, but if there is a second copy of it that should be able to be local-only
- Needs and wants arising from the question, "What services should a possible new consortium provide?"
 - Dedicated ILS administrator to handle changes and maintain functionality of the ILS - libraries still able to be individual within the system
 - Consistent training - accessible to every staff member and on a recurring and on-demand schedule
 - Training in cataloging of foreign language materials
 - Training in collection development of foreign language materials
 - Centralized cataloging - consistent cataloging across the consortium, and resource for records that are hard to source or unstandardized
 - ILS Technical Support
 - Group to discuss collection development policies and management and ensure consistency of materials, policies, and procedures
 - Authority control at a system level for when OCLC record updates happen
 - Help personalizing catalog for local libraries
 - Central storage for items that are valuable to a collection but not in high demand (e.g., special collections like holiday books, and out of date but historically important books)
 - Group purchasing of digital content for distribution to all/most consortium members
 - Use of "zones" to assist ILS in prioritizing holds and borrowing between library systems
 - RFID standardization plan as part of start-up or membership to the consortium
- Needs and wants arising from the question, "Describe your desires for Courier Service as part of any possible new consortium."
 - Connected zones to streamline courier services
 - Reliable courier service across the system
 - Analysis on material handling to ensure efficiency in handling and shipping of items

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- Use of uncommon shipping methods (e.g., postal services' library rate or a boat/bookmobile) where needed
- Database cleanup
- Provide path to resolution over disagreements between libraries (e.g., sharing, cataloging, collection policies, etc.)
- Sharing programming opportunities/costs
- Sharing staff training opportunities/costs
- Have an expert to go to with questions about documentation to support staffing positions, paperwork, training.
- Planned alternatives in case of route difficulties (e.g., tunnel collapse, roads flooding, etc.)
- Courier management and accountability in accurate tracking of items
- Consortium Structure - Separate Entity or hosted by one library / library system?
 - Separate entity with "umbrella" services (e.g., ILS, technical help, cataloging)
 - Hosted by one library/library system that provides services to other libraries
- Governance needs and wants arising from the question, "Thoughts on Governance Structure?"
 - Decision making by simple majority (with decisions written into bylaws if any decisions require consensus)
 - 501c3 structure
 - Tiered system of libraries (e.g., Ones who use all services, participate in meetings, and vote on issues; and ones that use minimal services "keep the lights on", or "Full" and "Associate" members)
 - 2nd tier libraries can be sponsored by other libraries
 - Communication expected to and from all levels
 - An exit strategy to be outlined in the governance structure prior to formation
- Staffing needs and wants arising from the question, "Thoughts on Staffing Structure?"
 - Outline which staff positions are key functions that must be in place for startup and which can be added as the consortium grows
 - Possibility of subcontracting some functions
 - Contracts staffer (position called out as a crucial one to the consortium)
 - Accounts payable staffer (position called out as a crucial one to the consortium)
 - 501c3 compliance staffer (position called out as a crucial one to the consortium)
 - Communications staffer (position called out as a crucial one to the consortium)
- Funding / Fee Structure needs and wants arising from the question, "Thoughts on Funding or Fee Structure?"
 - Apply for grants for start-up funding, with membership fees for continual funding

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- Possibility of some larger libraries/systems absorbing the cost for smaller libraries/systems that can't pay a designated fee
- Fee structure should reflect the voting structure
- Fee structure and voting structure are separate systems but each are clearly defined
- Consistent way to assess the membership fee - proportionate by population served or other metric
- Predictability and transparency on fees and funding and a plan for increases
- Consortium Structure - Other Thoughts
 - Protective language and professional standards to defend against collection challenges against individual or system libraries
 - Survey of shared collection materials to understand the degree of increased available materials patrons would have access to (e.g., this consortium has access to # of unique items")



11. Quick Comparison

11.1. Top 20 ILS Functions and Performance Rankings

The listing below shows the top 20 functional areas rated most important by advisory board members, combined with their ranking of satisfaction for each of the top functional areas. Please note these rankings exclude any “No opinion” responses.

| High Dissatisfaction | Moderate Dissatisfaction | Low Dissatisfaction | Low Satisfaction | Moderate Satisfaction | High Satisfaction |
|----------------------|--------------------------|---------------------|------------------|-----------------------|-------------------|
| ☹ | ☹☹ | ☹☹☹ | ☹☹☹☹ | ☹☹☹☹☹ | ☹☹☹☹☹☹ |

| # | Category | ILS Function | Satisfaction |
|---|--|---|--------------|
| 1 | Circulation & Materials Management | Holds management | ☹☹ |
| 2 | Staff Client / Software for Accessing the Library System Functions | Ability for library staff to manage local settings such as library closed days, messaging, loan periods, etc. | ☹☹ |
| 3 | Cataloging & Authority Control | Ability to bring in records from other sources (e.g., OCLC) | ☹☹ |
| 4 | Online Public Access Catalog (OPAC), Searching, and Discovery | Web-based catalog that can be customized by each library system or location | ☹☹ |
| 5 | Circulation & Materials Management | Routing/transit functions between library locations | ☹☹ |
| 6 | Reports / Business Intelligence | Customizable reports | ☹☹ |
| 7 | Online Public Access Catalog (OPAC), Searching, and Discovery | Responsive design for support across a variety of screen sizes | ☹☹ |

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| | | | |
|----|---|--|--|
| 8 | Mobile Interface for the Library Catalog, Self-Service, and Discovery | Alerts for overdues and available holds | |
| 9 | Circulation & Materials Management | Variety of patron notification options including email, text, and HTML formatting | |
| 10 | Online Public Access Catalog (OPAC), Searching, and Discovery | Alerts for overdues, fines, available holds, etc. | |
| 11 | Circulation & Materials Management | Inventory support | |
| 12 | Mobile Interface for the Library Catalog, Self-Service, and Discovery | Place holds on physical & digital materials | |
| 13 | Online Public Access Catalog (OPAC), Searching, and Discovery | Patron account access with information about checkouts, history, holds & ILL information, etc. | |
| 14 | Other | Data and transaction security at industry standards for patron information, searching the catalog, and other areas | |
| 15 | Mobile Interface for the Library Catalog, Self-Service, and Discovery | Ability to find and interact with content from digital collections (place holds, checkout, return) such as Overdrive, cloudLibrary, and Hoopla | |
| 16 | Reports / Business Intelligence | Reports on real-time data | |
| 17 | Online Public Access Catalog (OPAC), Searching, and Discovery | Patron edit options including PIN and address updates | |
| 18 | Online Public Access Catalog (OPAC), Searching, and Discovery | Integration with Overdrive, Hoopla, cloudLibrary, and other electronic materials collections | |
| 19 | Circulation & Materials Management | Support for automatic renewal of materials | |
| 20 | User management | Support for a variety of messaging formats: text (SMS), HTML, email, etc. | |



12. Detail: Importance and Satisfaction of ILS Functions/Modules

12.1. Introduction

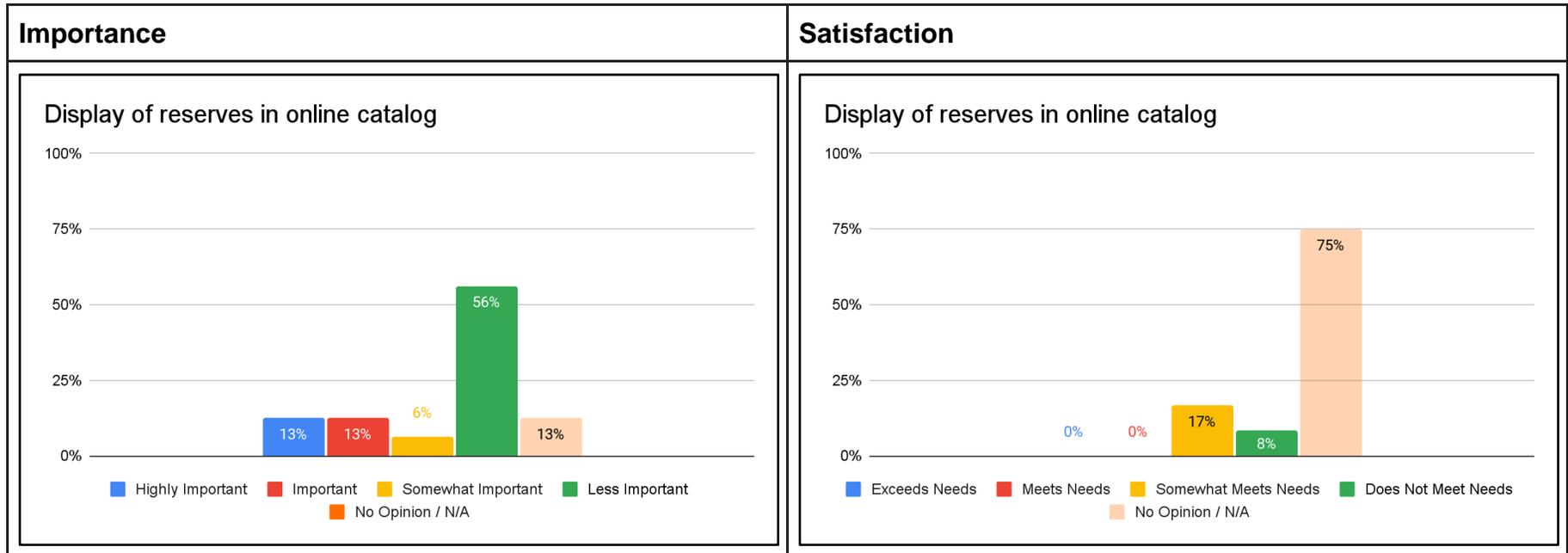
In the survey, respondents were asked to rate the importance of ILS functions and their satisfaction with the way their current ILS fulfills those functions. Those rankings were on a 1-4 scale, with a “No opinion/N/A” option. This allowed the easy comparison of importance to satisfaction, as displayed in the charts in this section.

To compare these two factors, look at the importance of the function (on the left side of the page) vs. its satisfaction rating (on the right side of the page). As an example, for an ILS function to be mostly “Highly Important”, but to only be rated as “Somewhat Meets Needs” means there is some room for a service to improve on current functionality and provide more satisfaction to users.



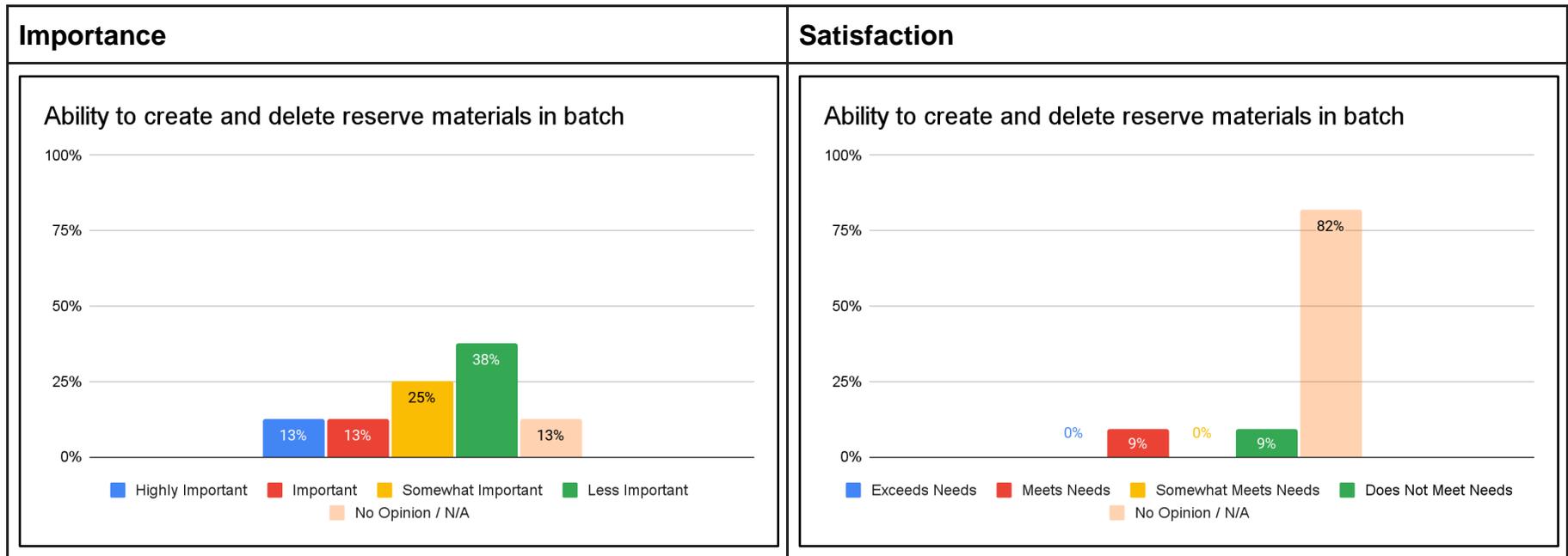
12.2. Academic Reserves

12.2.1. Display of reserves in the online catalog



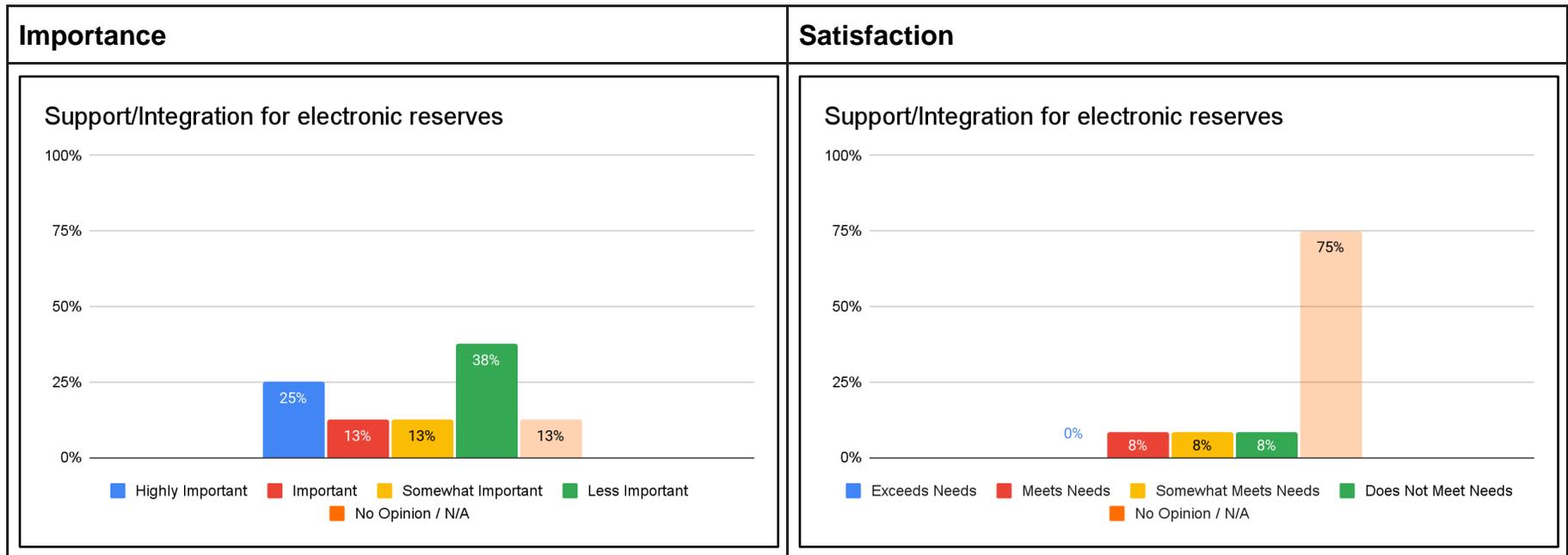


12.2.2. Ability to create and delete reserve materials in batch



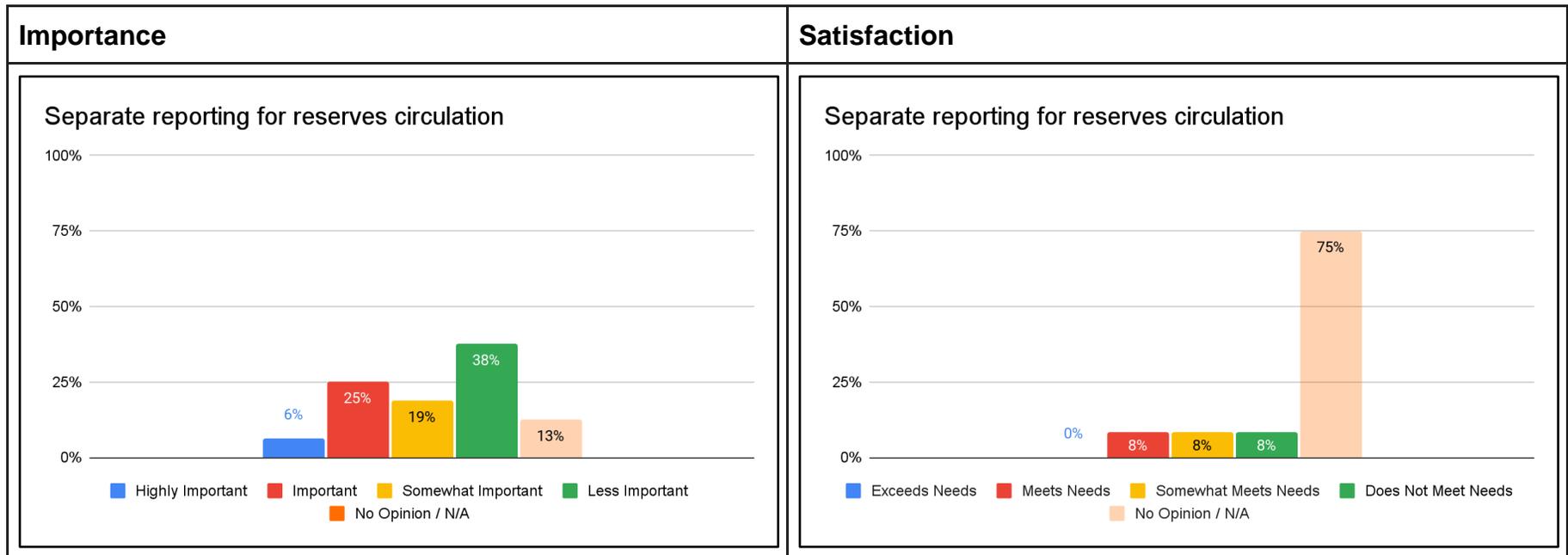


12.2.3. Support/Integration for electronic reserves





12.2.4. Separate reporting for reserves circulation





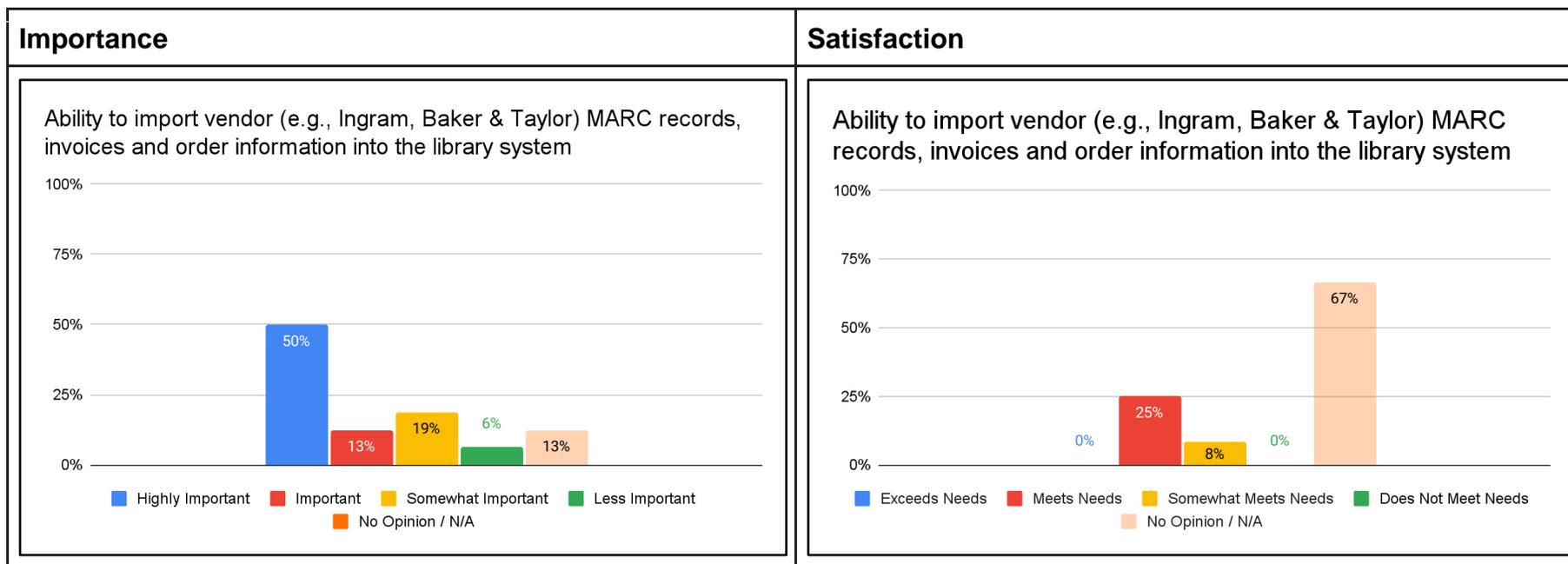
12.2.5. Academic Reserves Comments

| Importance | Satisfaction |
|---|--|
| <ul style="list-style-type: none"> • <i>Since [Library] is a public library, academic reserves are not applicable.</i> • <i>We add our reserves in using regular cataloging and have a RESERVES location, so we don't need it as a module. If we did use it, it would be nice to have the additional features.</i> • <i>As a public library, these are not urgent for us.</i> • <i>We don't have academic reserves.</i> • <i>I work in an administrative office. These functions are very important for the community college libraries, but not as important for most of the public libraries.</i> • <i>We are a public library and might not use this function as it was designed to be utilized.</i> | <ul style="list-style-type: none"> • <i>We haven't tried using this.</i> • <i>no reserves module</i> • <i>Public Library here</i> |



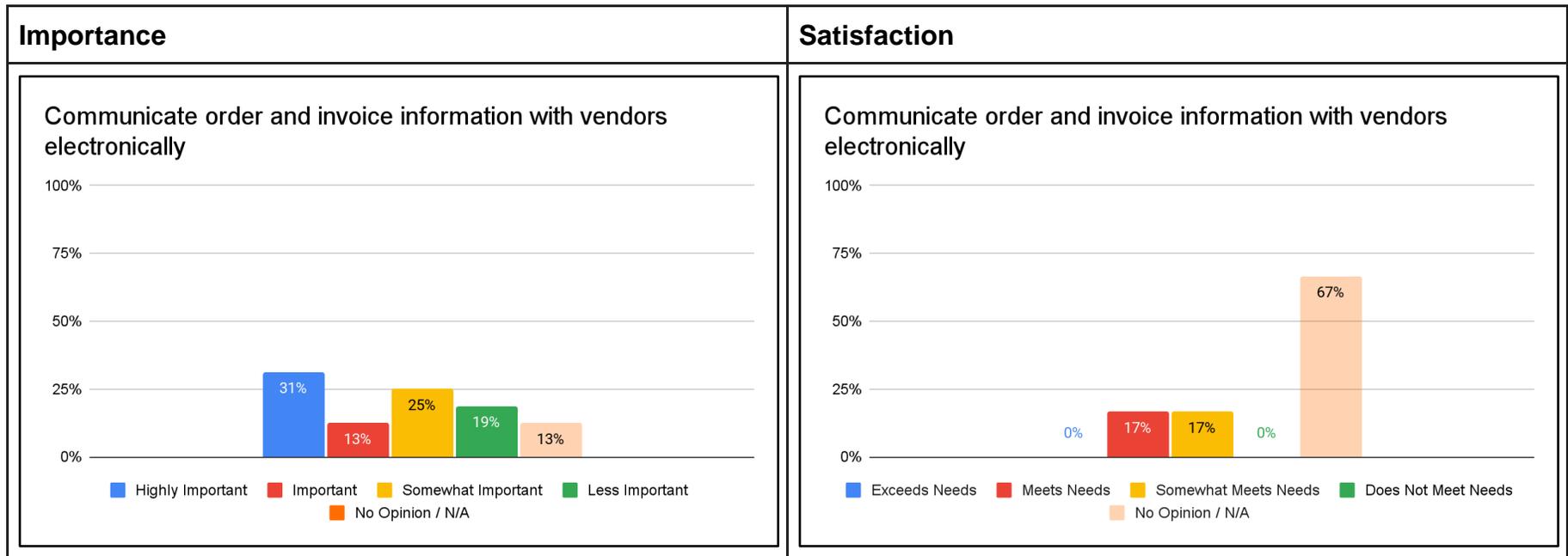
12.3. Acquisitions

12.3.1. Ability to import vendor (e.g., Ingram, Baker & Taylor) MARC records, invoices and order information into the library system



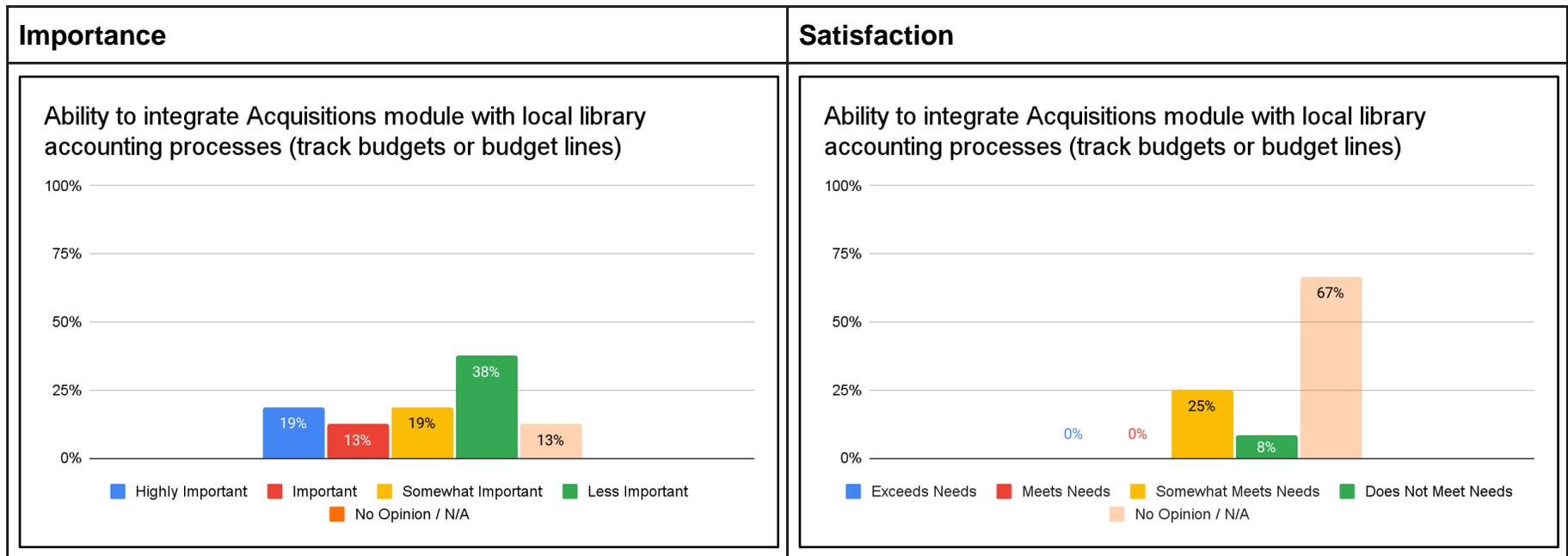


12.3.2. Communicate order and invoice information with vendors electronically



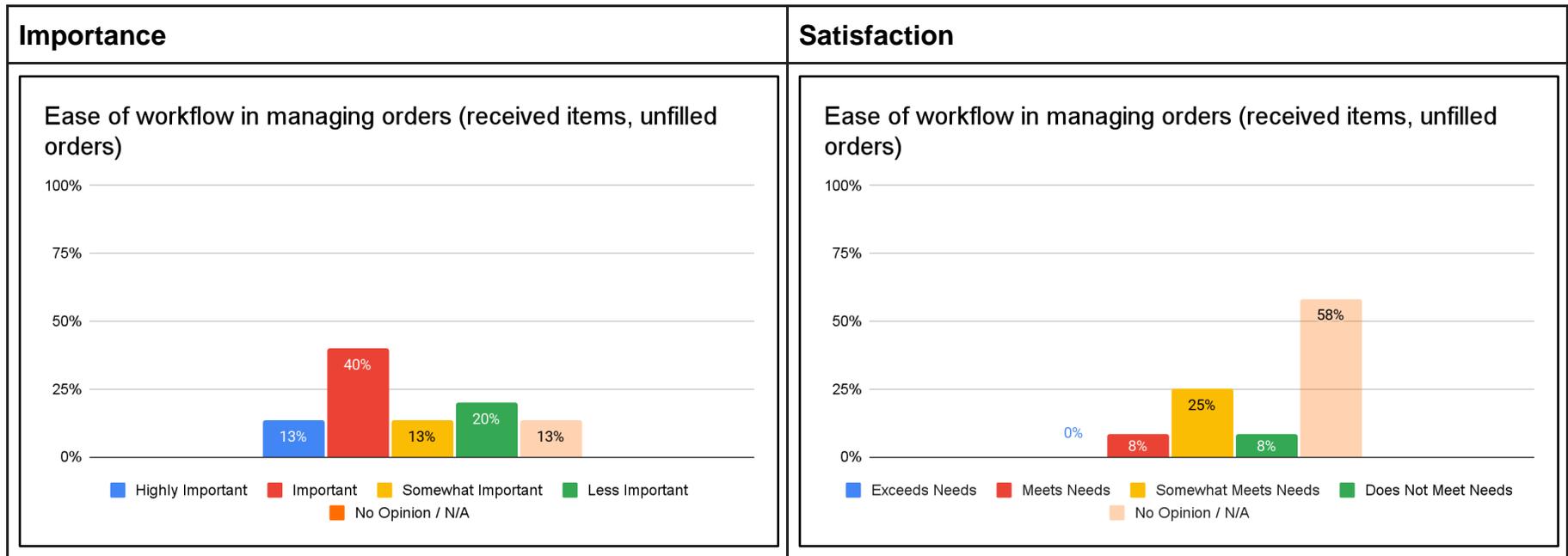


12.3.3. Ability to integrate Acquisitions module with local library accounting processes (track budgets or budget lines)



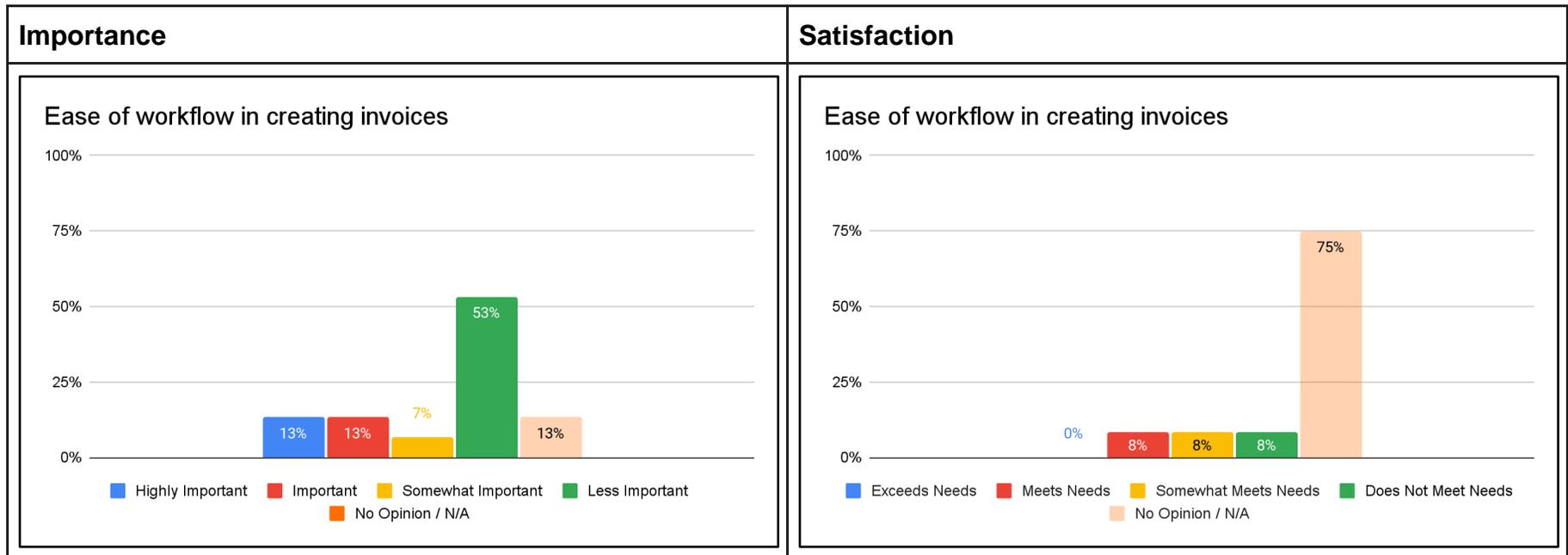


12.3.4. Ease of workflow in managing orders (received items, unfilled orders)



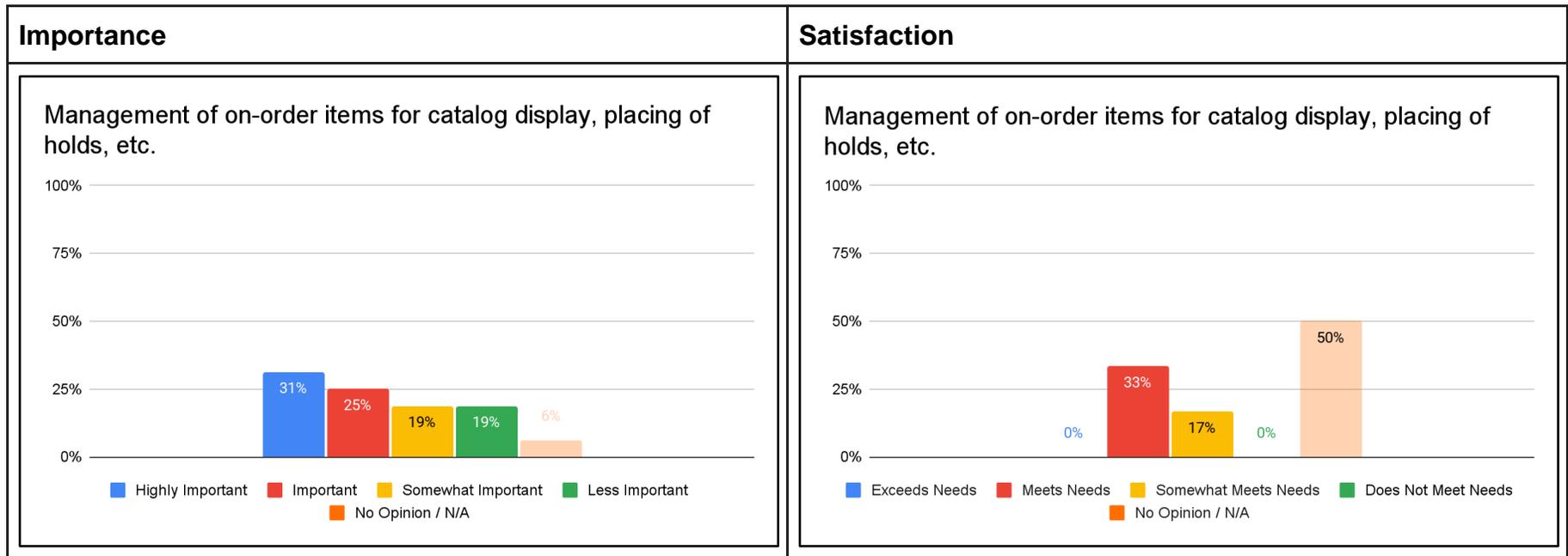


12.3.5. Ease of workflow in creating invoices



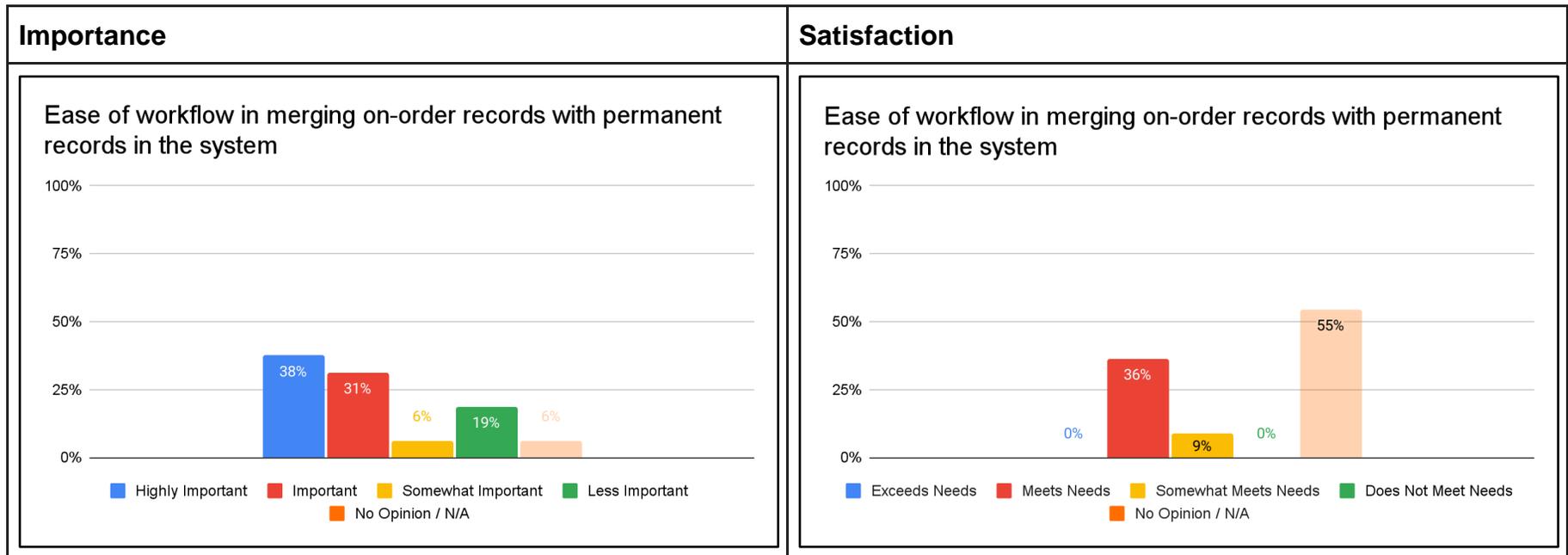


12.3.6. Management of on-order items for catalog display, placing of holds, etc.



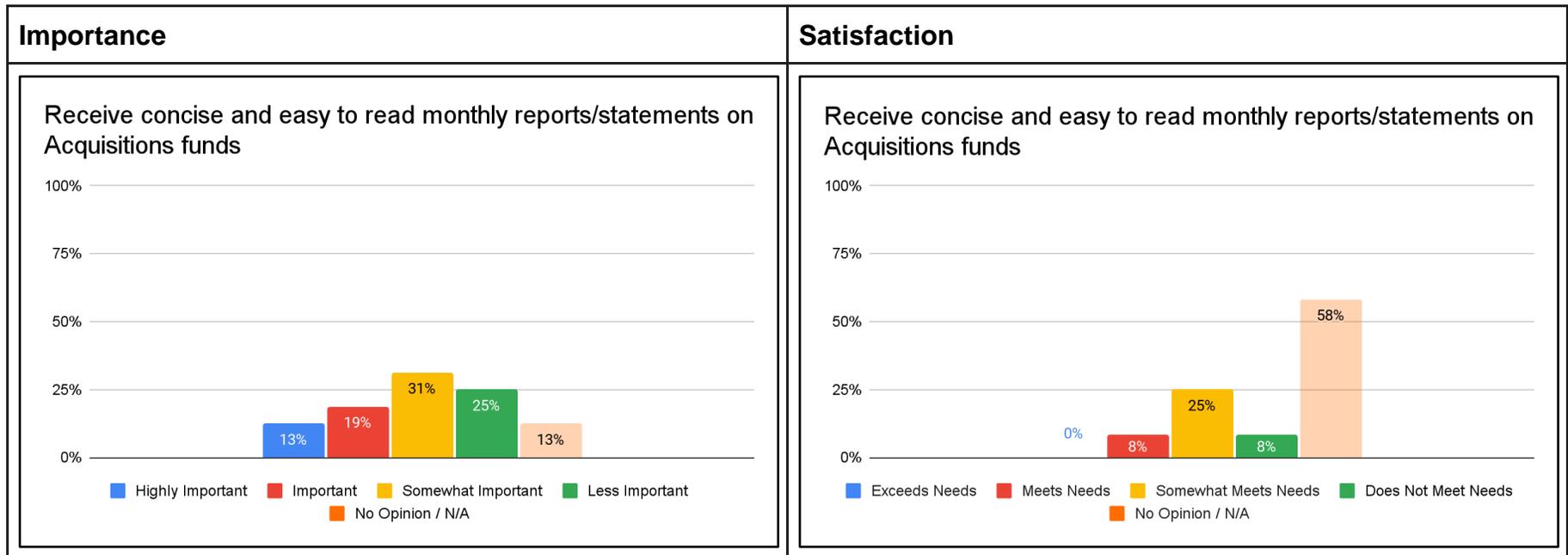


12.3.7. Ease of workflow in merging on-order records with permanent records in the system





12.3.8. Receive concise and easy to read monthly reports/statements on Acquisitions funds



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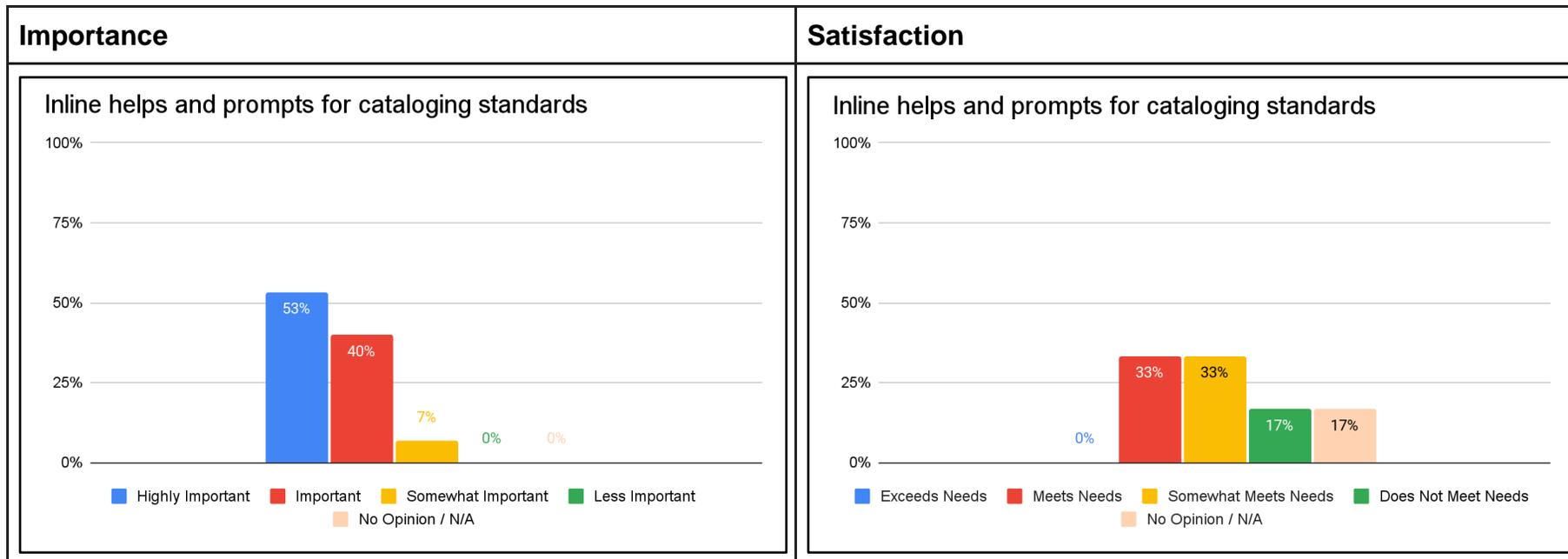
12.3.9. Acquisitions Comments

| Importance | Satisfaction |
|--|---|
| <ul style="list-style-type: none"> <i>We just started using Baker and Taylor. So far we haven't used the acquisitions module at all; but I expect to in the future. But if we do use it, it will be important that the ILS plays nice with on-order records.</i> <i>We have a system that works well for us that does not involve the ILS except entering at the end of cataloging</i> <i>None of the libraries in [our library network] currently use Acquisitions. The ability to easily load on-order records and incorporate these items for patron holds is important for two of the larger libraries in [county library].</i> | <ul style="list-style-type: none"> <i>Koha may very well be capable of generating better reports and merging records more efficiently, but staff do not know how to do so. We are in the process of looking into ways to make better use of those features.</i> <i>We haven't been using this module but might like to in the future.</i> |



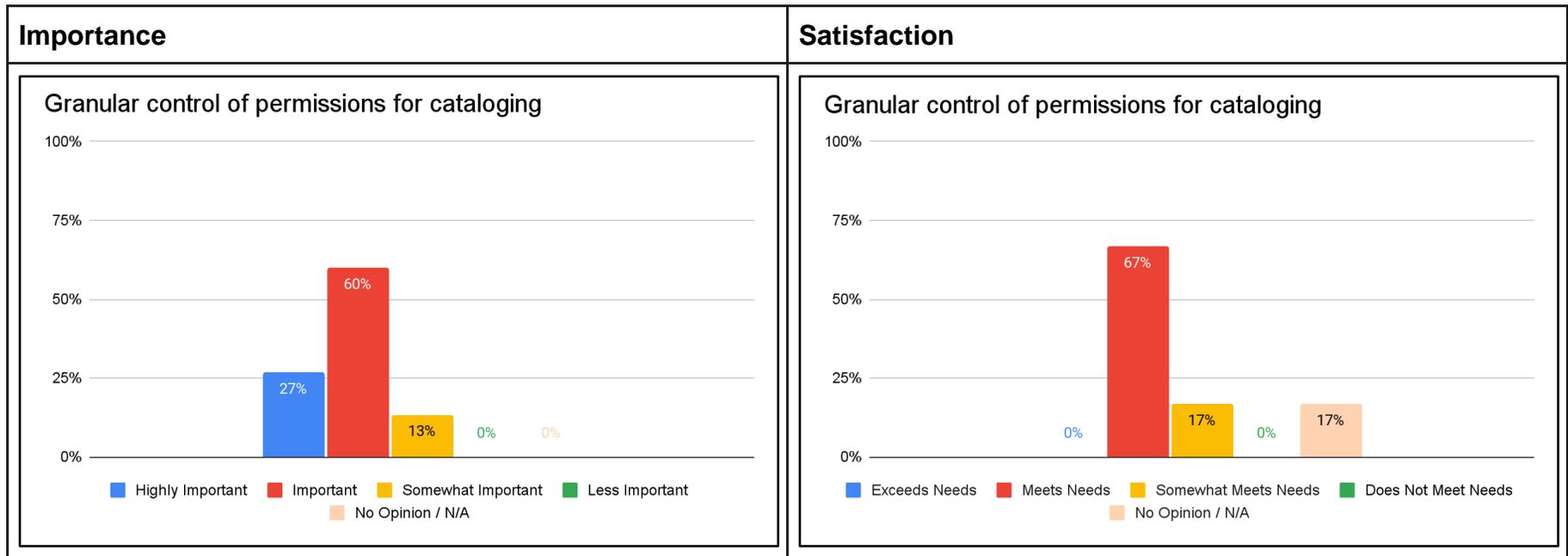
12.4. Cataloging & Authority Control

12.4.1. Inline helps and prompts for cataloging standards



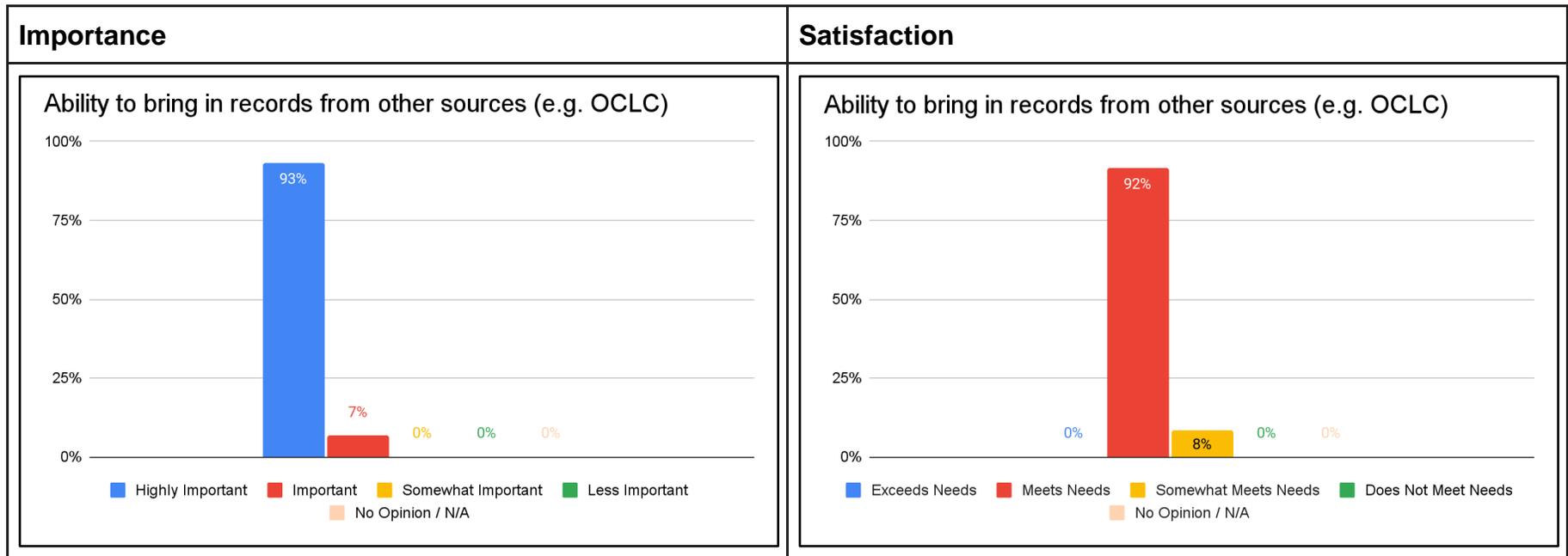


12.4.2. Granular control of permissions for cataloging



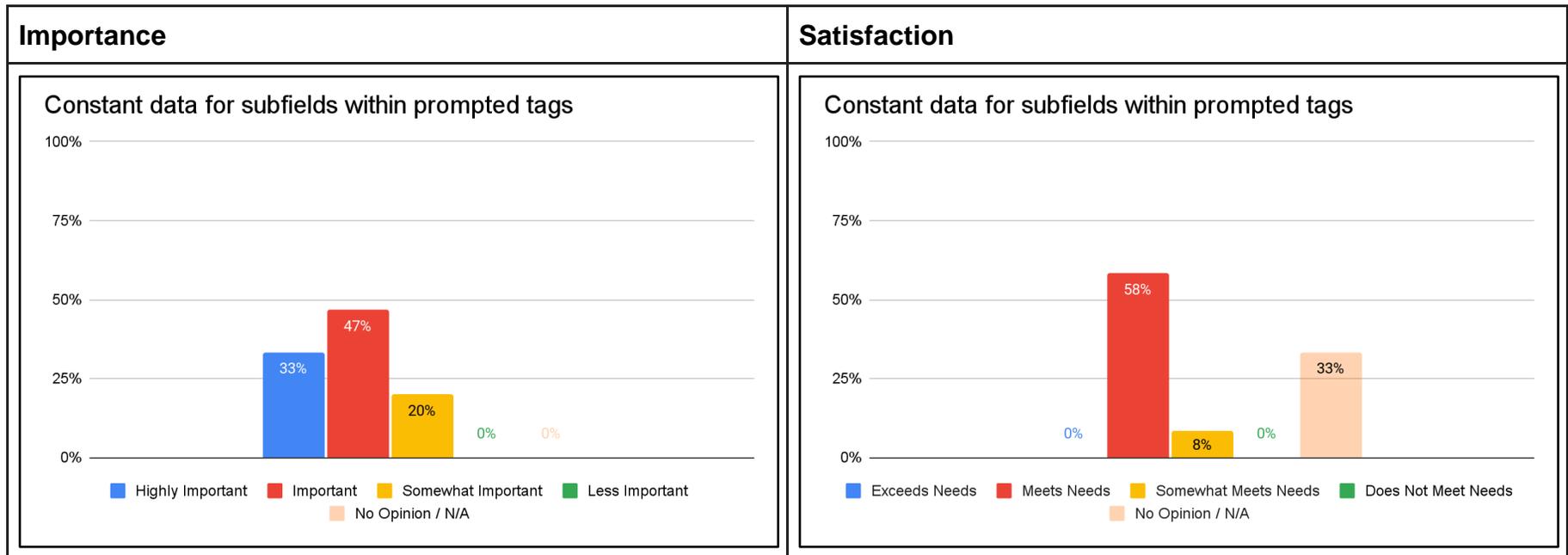


12.4.3. Ability to bring in records from other sources (e.g., OCLC)



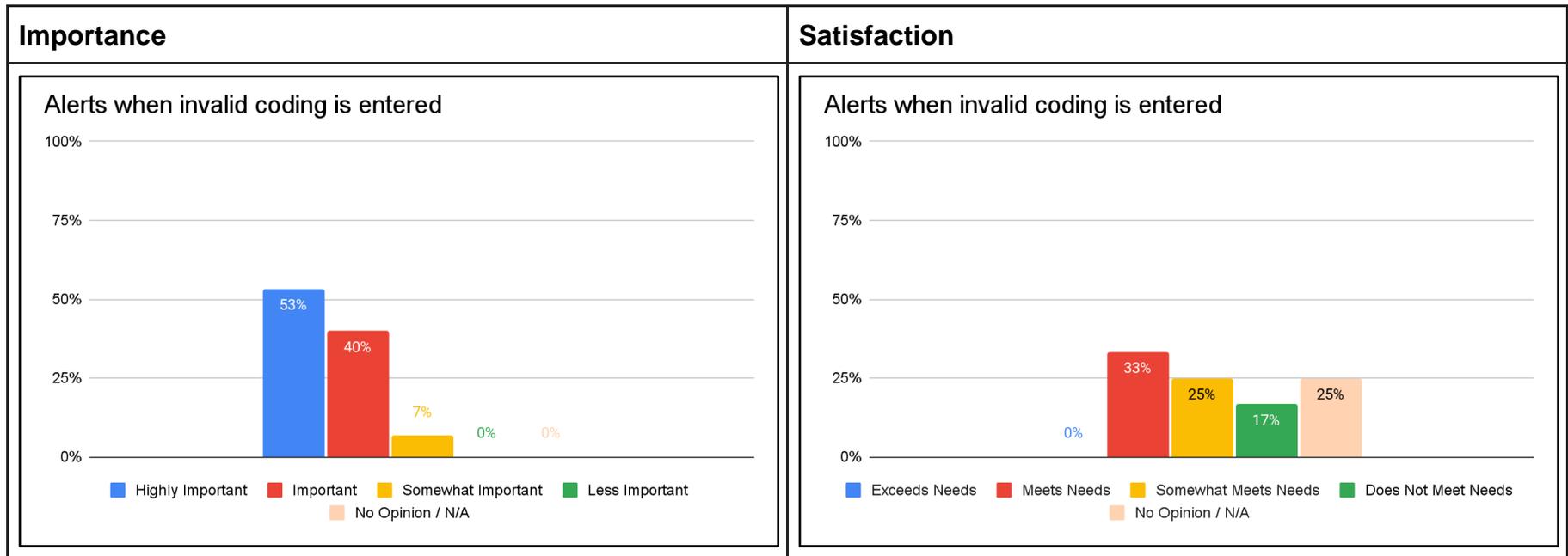


12.4.4. Constant data for subfields within prompted tags





12.4.5. Alerts when invalid coding is entered





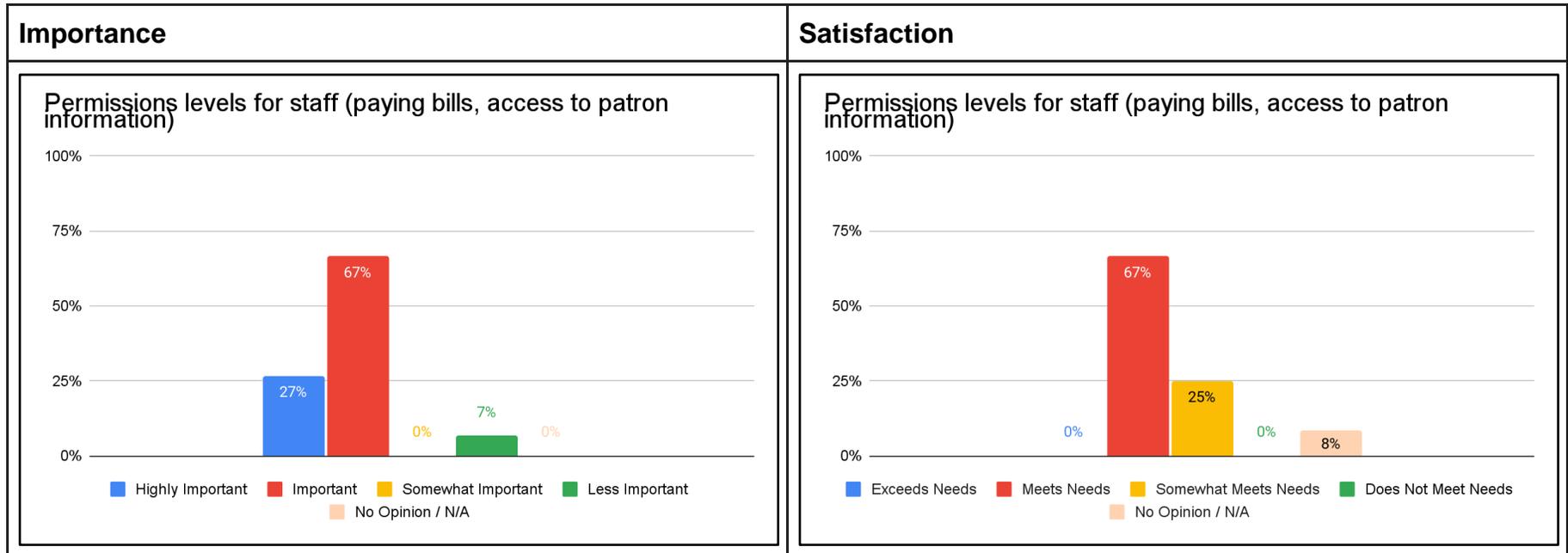
12.4.6. Cataloging and Authority Control Comments

| Importance | Satisfaction |
|---|---|
| <ul style="list-style-type: none">• <i>Although Ingram is our main vendor, we often add records from other sources such as Amazon and donations, so the ability to import records or create our own is very useful.</i>• <i>I don't think we get alerts with invalid code now, so it isn't as vital. But most other aspects of cataloging are highly important, as it is one of the modules we use the most.</i>• <i>Not sure what you mean by prompted tags.</i> | <ul style="list-style-type: none">• <i>We can import catalog records from Ingram and z searches, but for OCLC it's a matter of copying and pasting and not directly importing. It would be very helpful if we could directly import.</i>• <i>Sierra does not seem to have much in the way of inline prompts.</i> |



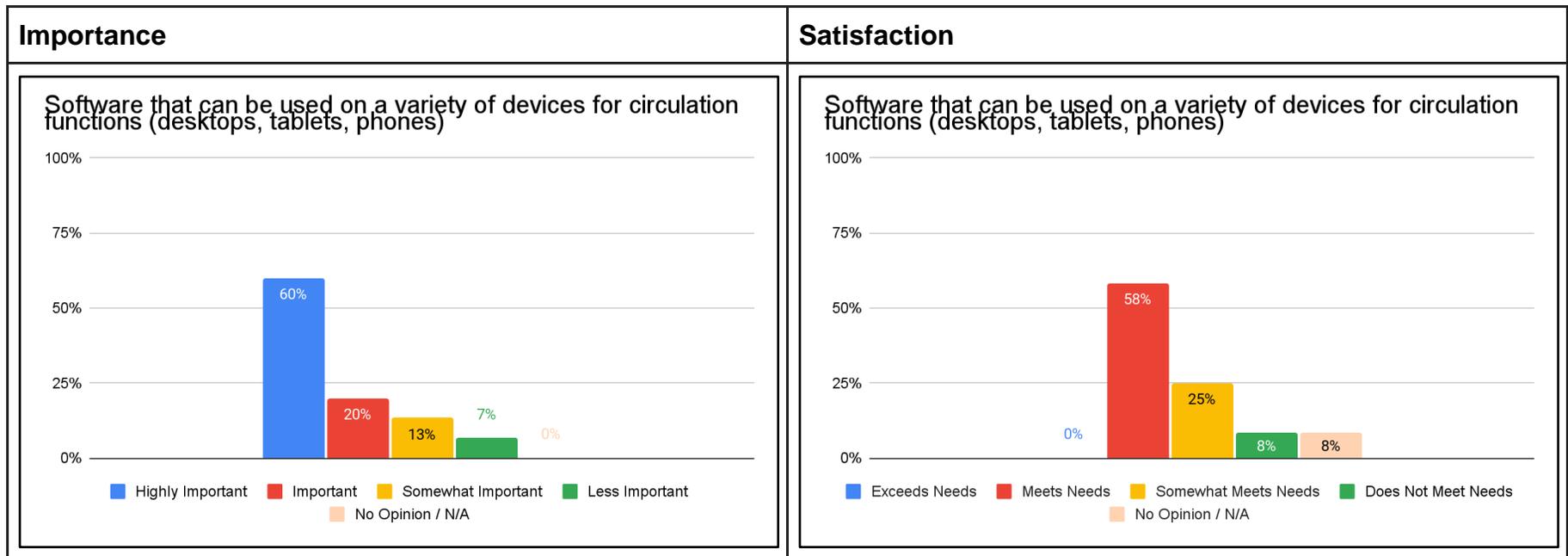
12.6. Circulation & Materials Management

12.6.1. Permissions levels for staff (paying bills, access to patron information)



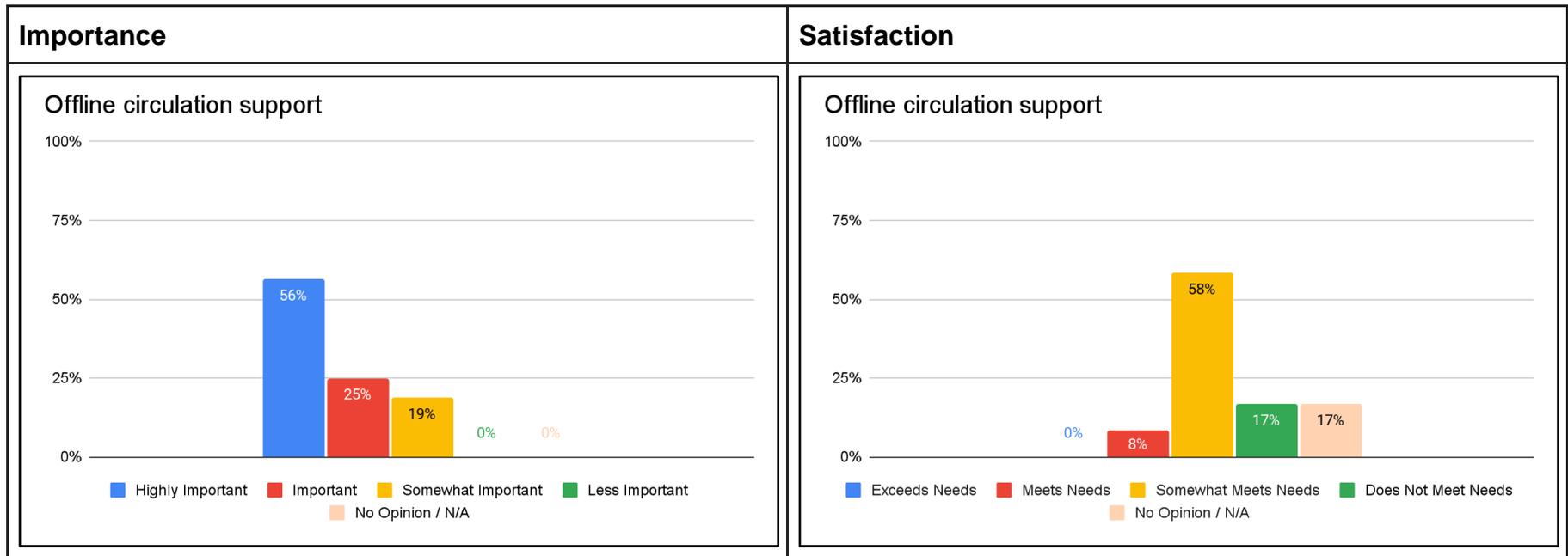


12.6.2. Software that can be used on a variety of devices for circulation functions (desktops, tablets, phones)



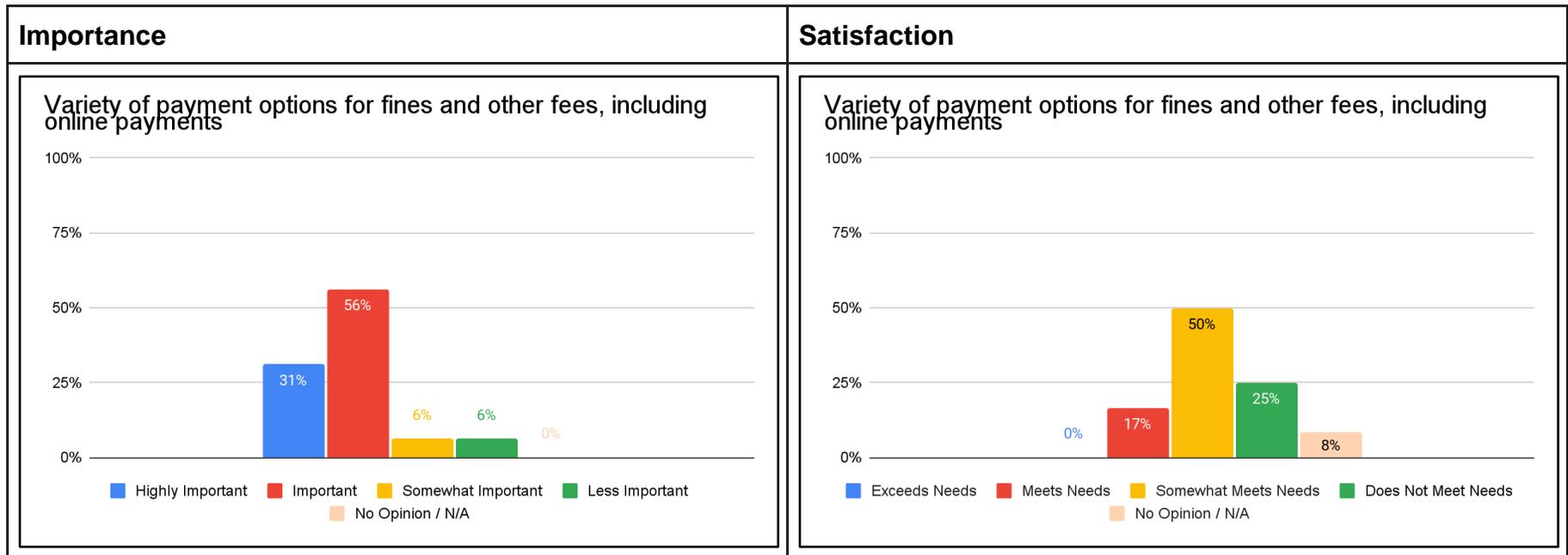


12.6.3. Offline circulation support



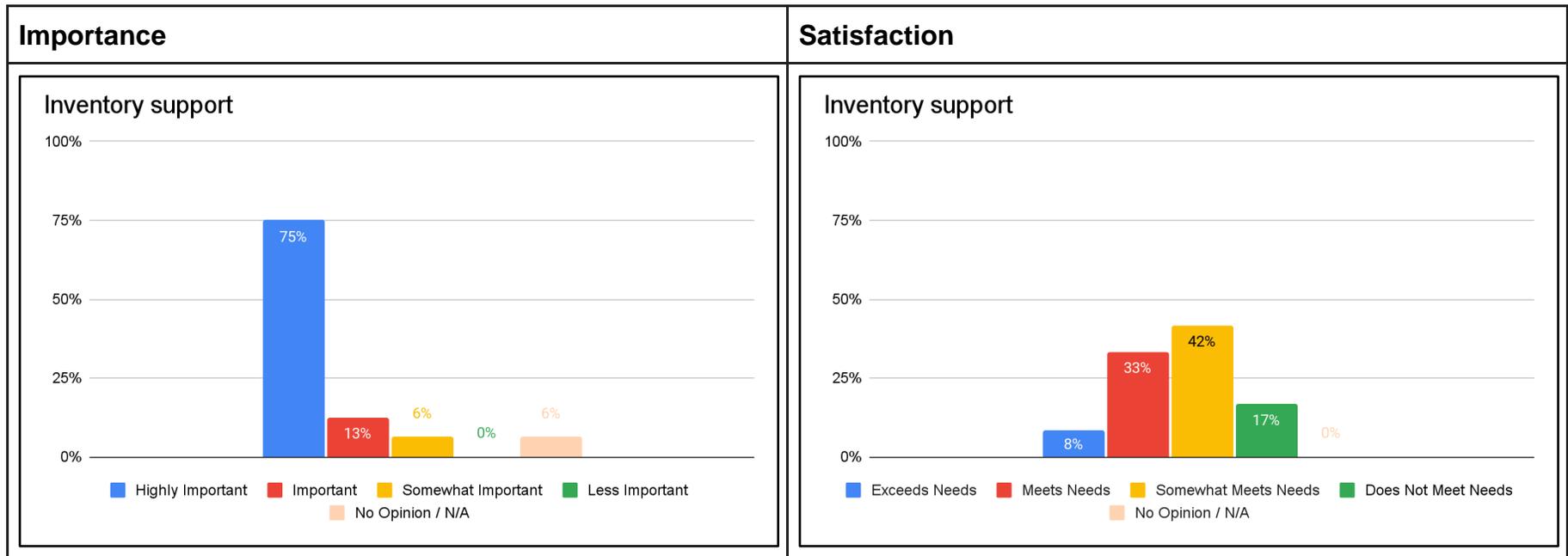


12.6.4. Variety of payment options for fines and other fees, including online payments



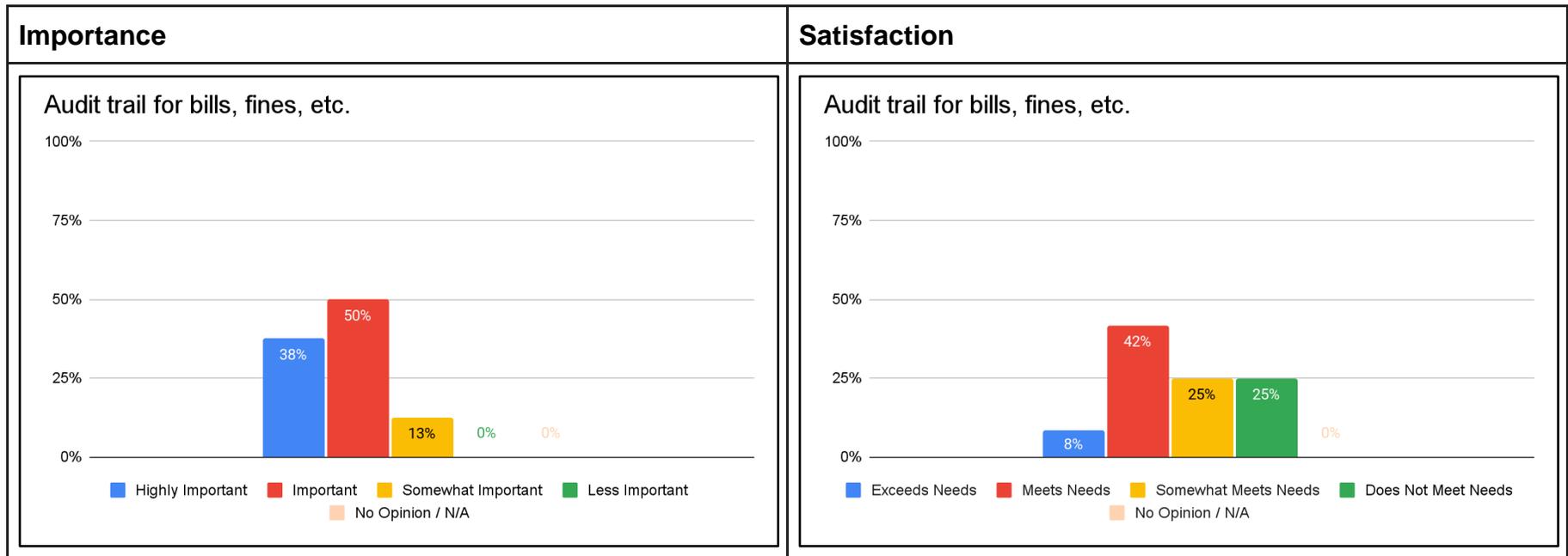


12.6.5. Inventory support



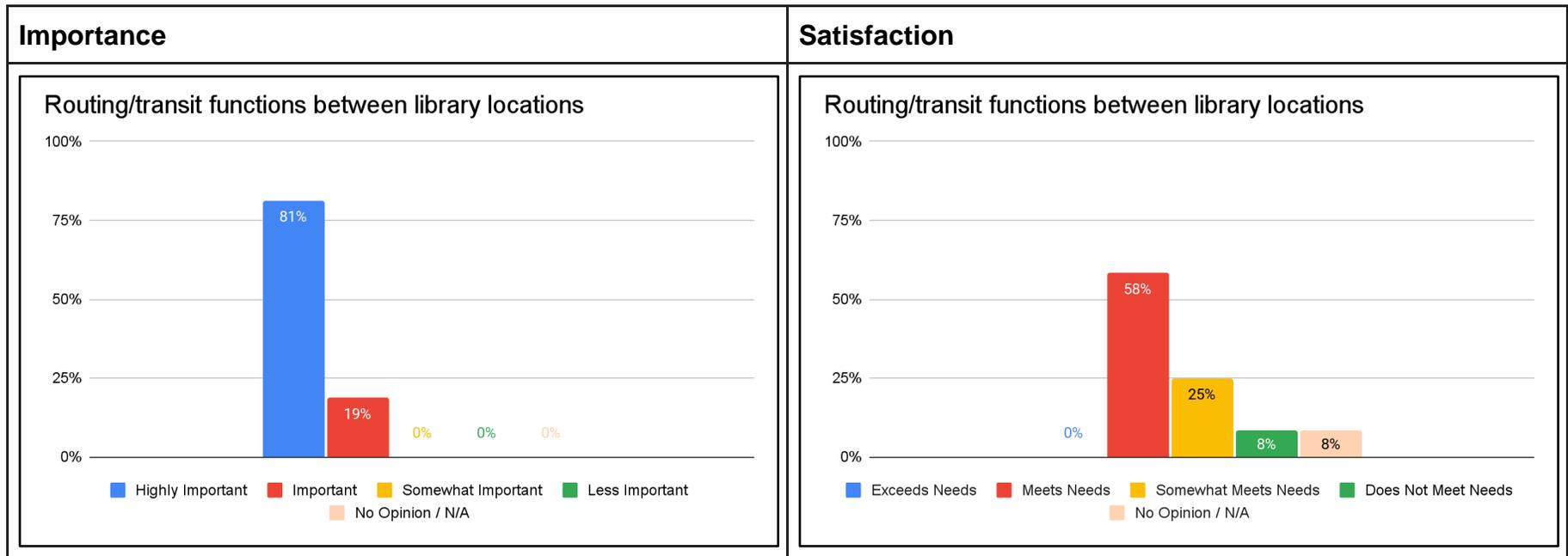


12.6.6. Audit trail for bills, fines, etc.



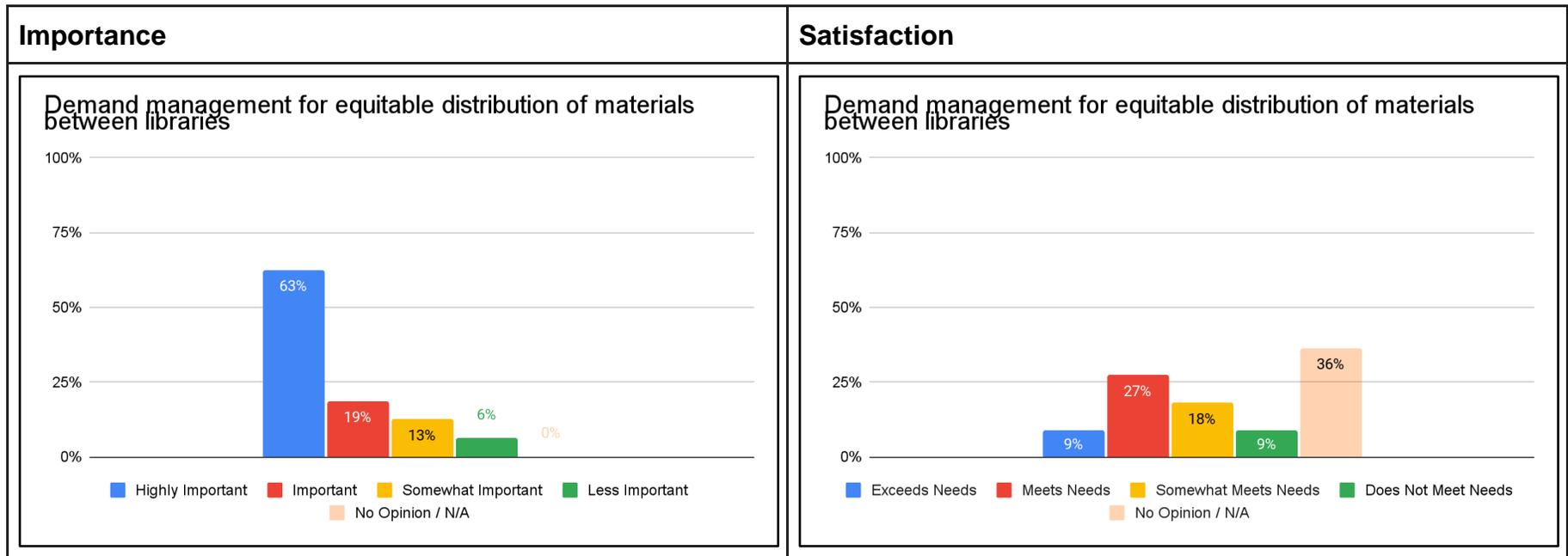


12.6.7. Routing/transit functions between library locations



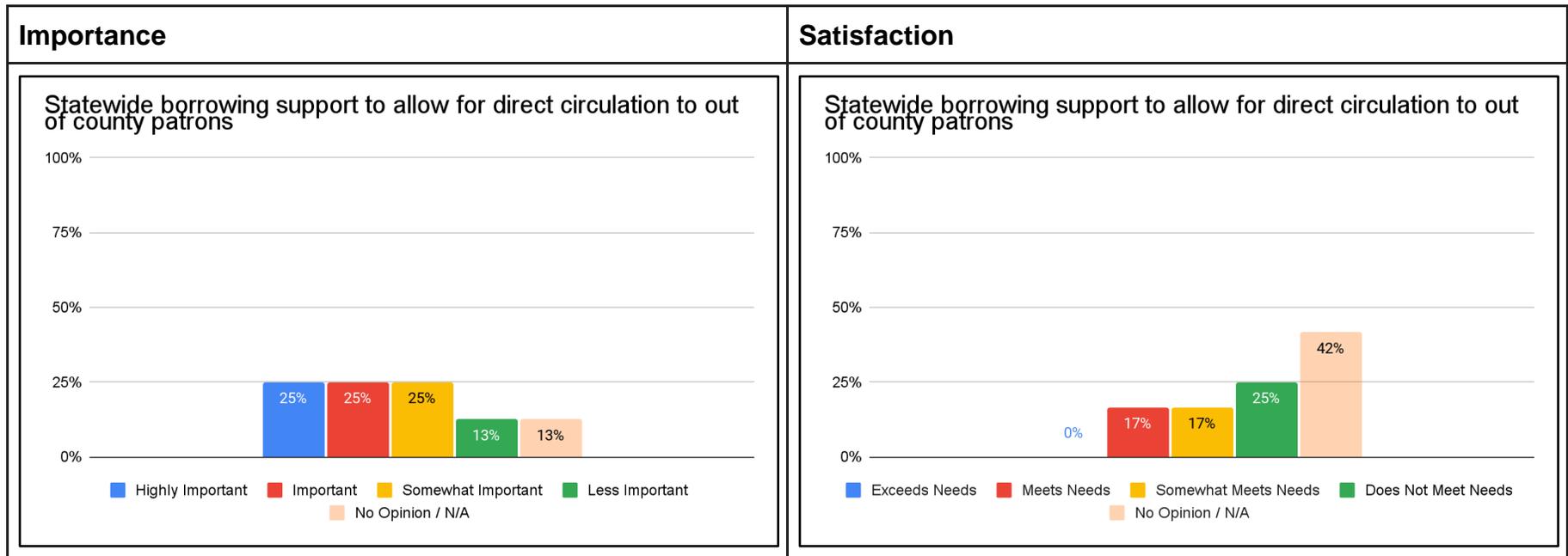


12.6.8. Demand management for equitable distribution of materials between libraries



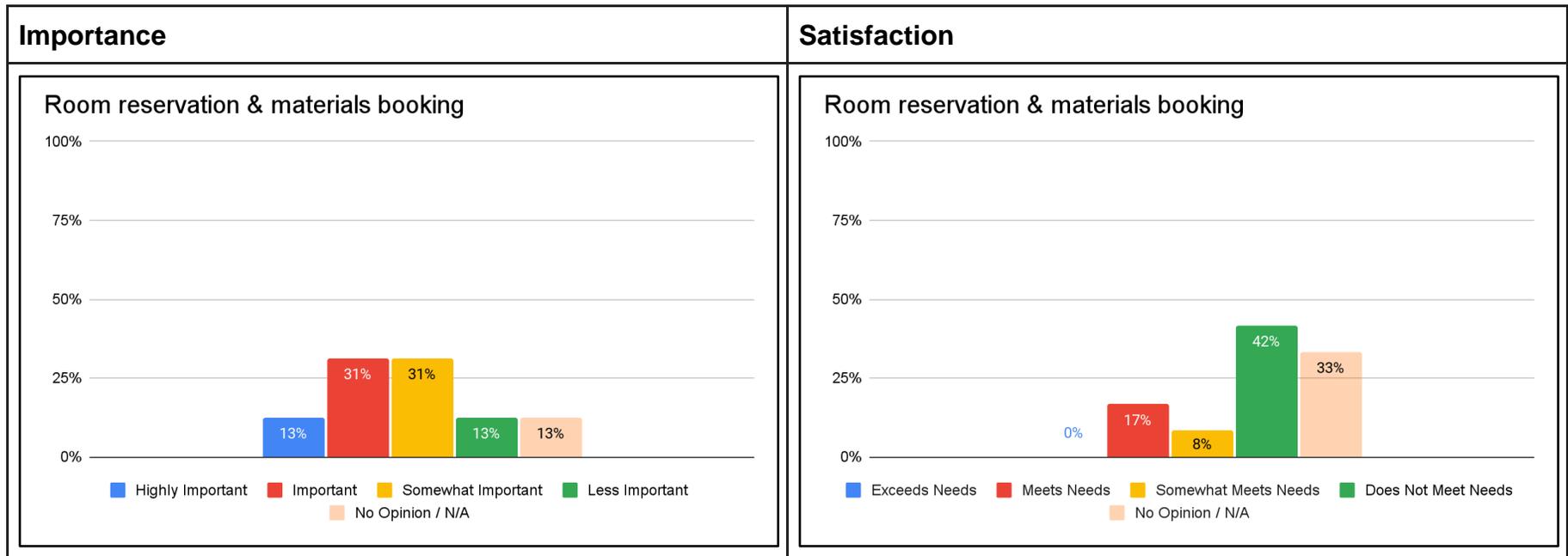


12.6.9. Statewide borrowing support to allow for direct circulation to out of county patrons



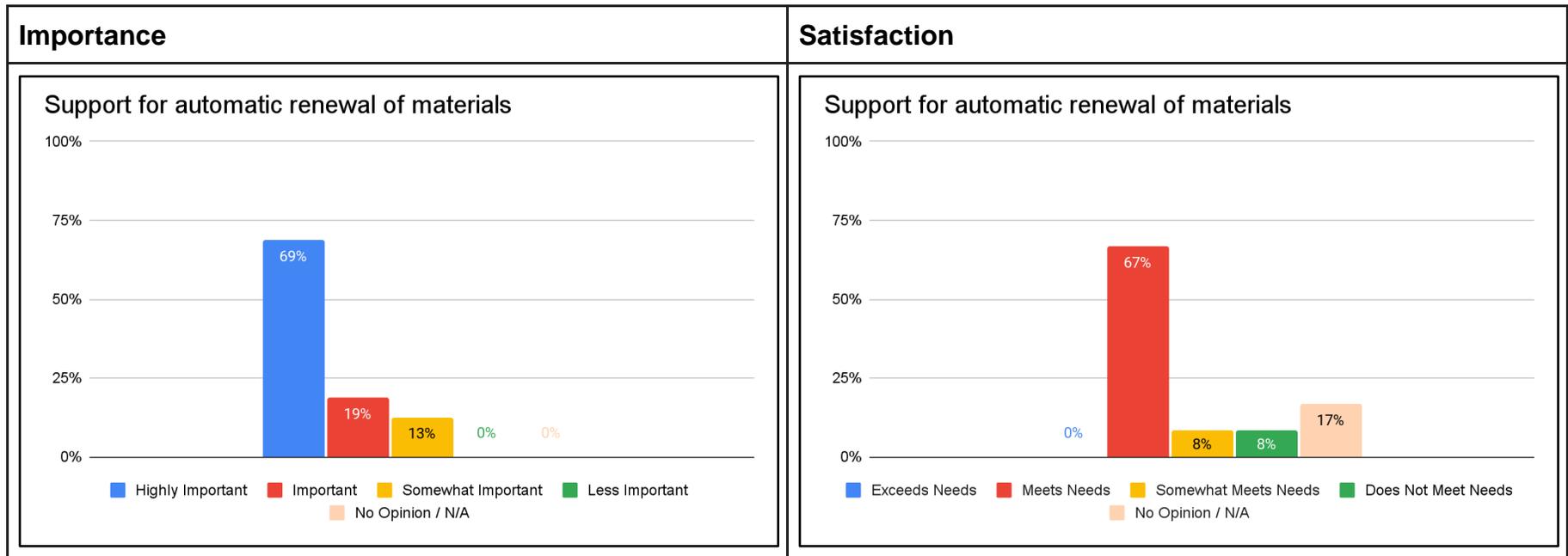


12.6.10. Room reservation & materials booking



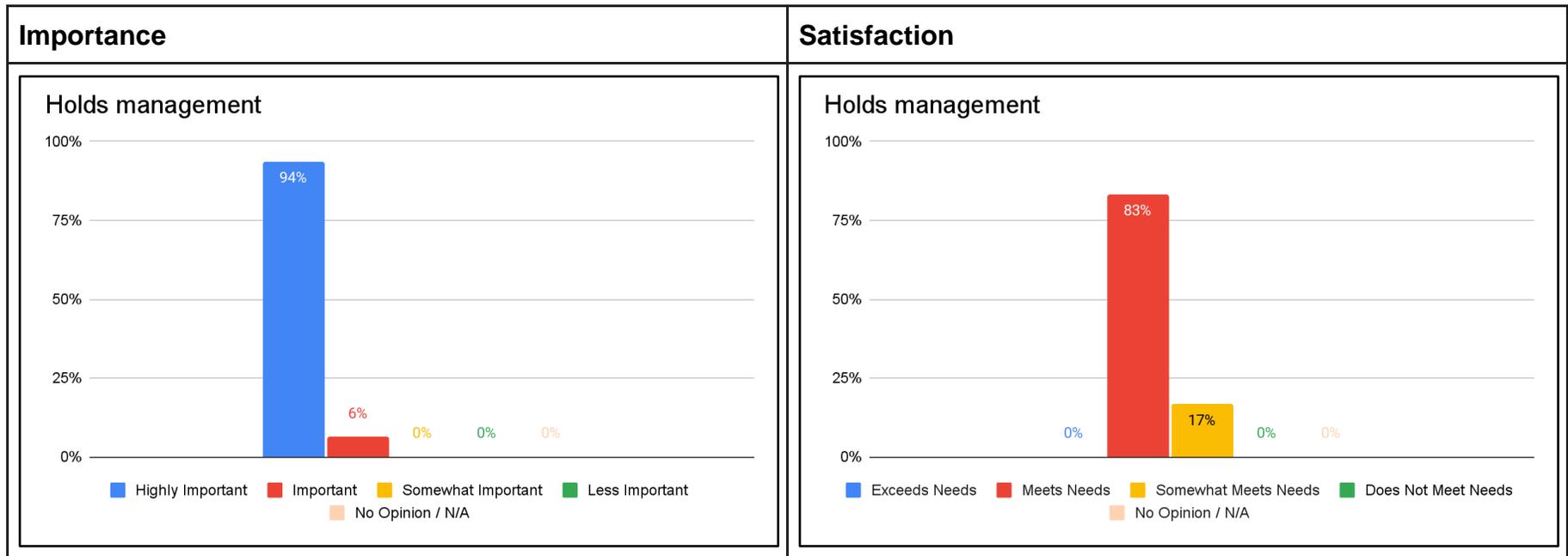


12.7.1. Support for automatic renewal of materials



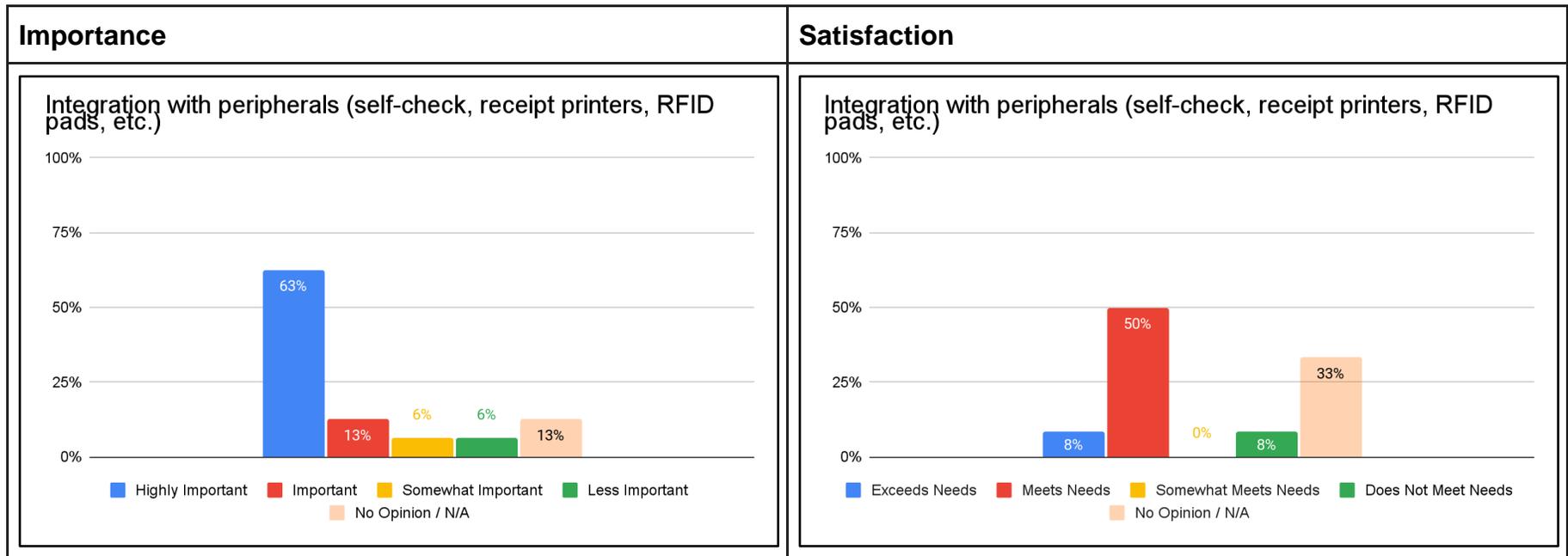


12.7.2. Holds management



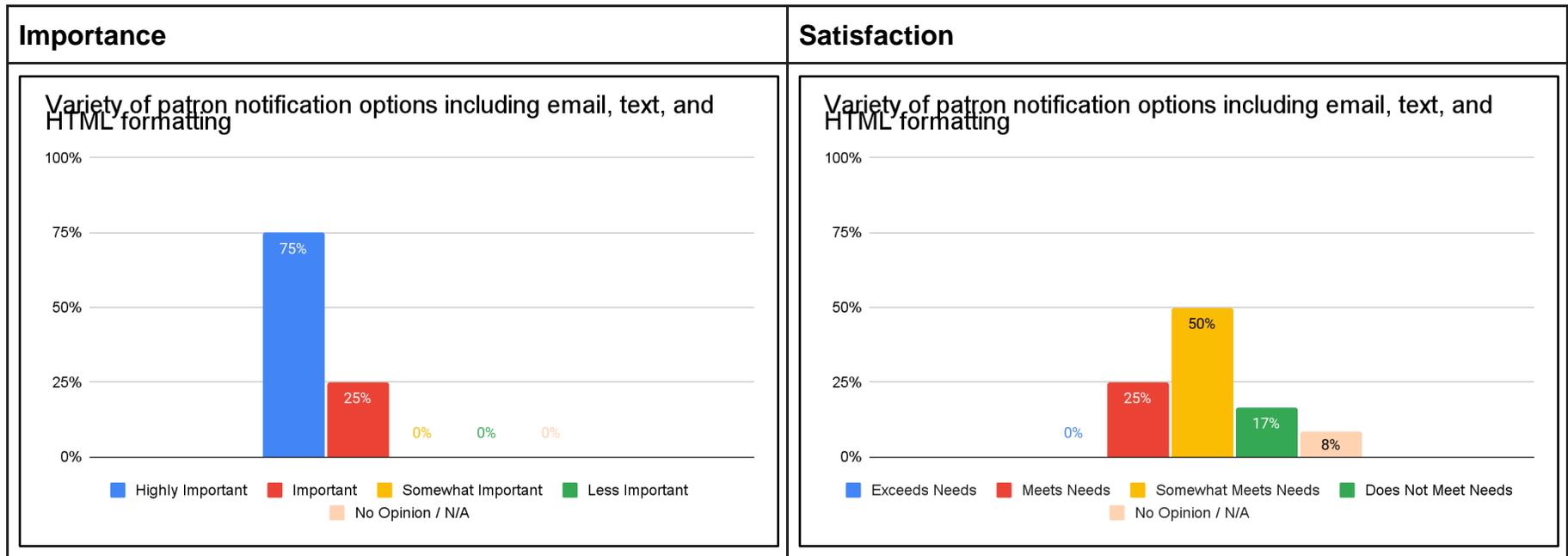


12.7.3. Integration with peripherals (self-check, receipt printers, RFID pads, etc.)





12.7.4. Variety of patron notification options including email, text, and HTML formatting





12.7.5. Circulation & Materials Management Comments

| Importance | Satisfaction |
|---|--|
| <ul style="list-style-type: none"> • <i>Most circ functions are very important. We don't have a receipt printer or RFID, and patrons don't pay bills to the ILS. But I want the audit trail to make sense.</i> • <i>Smart phone support is becoming an important interface for patron self-management, too.</i> | <ul style="list-style-type: none"> • <i>Koha does not have a functional offline version. I asked and while it technically does have an offline version it has very limited features and effectively does not work. It would be nice to have a fully functional version in case we needed to access the ILS while offline, such as from a laptop during an outreach event or if the library's Internet stops working. We only have one library in our system, so I do not have experience using Koha with multiple libraries.</i> • <i>Right now our notices are not working, and I haven't had time to troubleshoot why; that affects holds and renewals. I do know that the inventory function doesn't work well for us because the output report can't organize [library] call numbers! The audit trail is also messed up and I can't get it to balance right; one time I tried to cancel a fee so the patron would owe zero dollars and it went into the negative.</i> • <i>We are not utilizing these functions of Koha, if they exist.</i> • <i>The functional that supposedly could allow for room and materials bookings does not work anything like we were told it would.</i> |



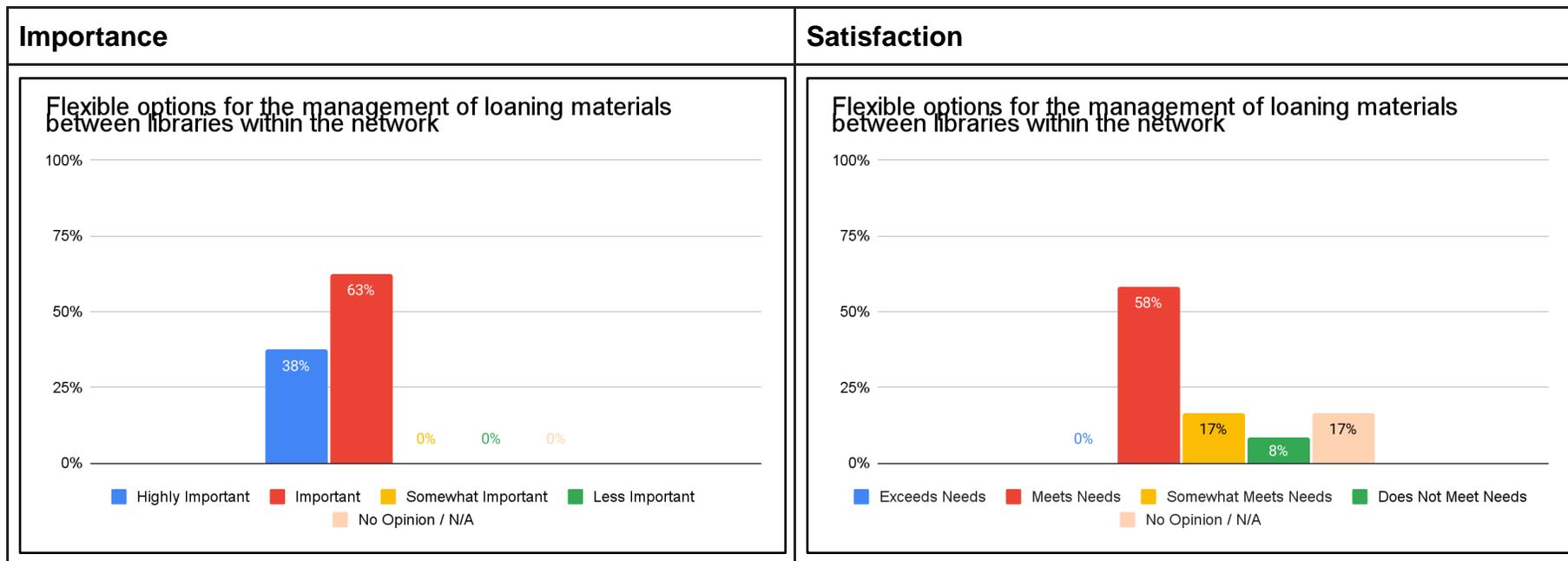
12.8. Interlibrary Loan

12.8.1. Integration with an interlibrary loan system for management of out of state loans





12.8.2. Flexible options for the management of loaning materials between libraries within the network





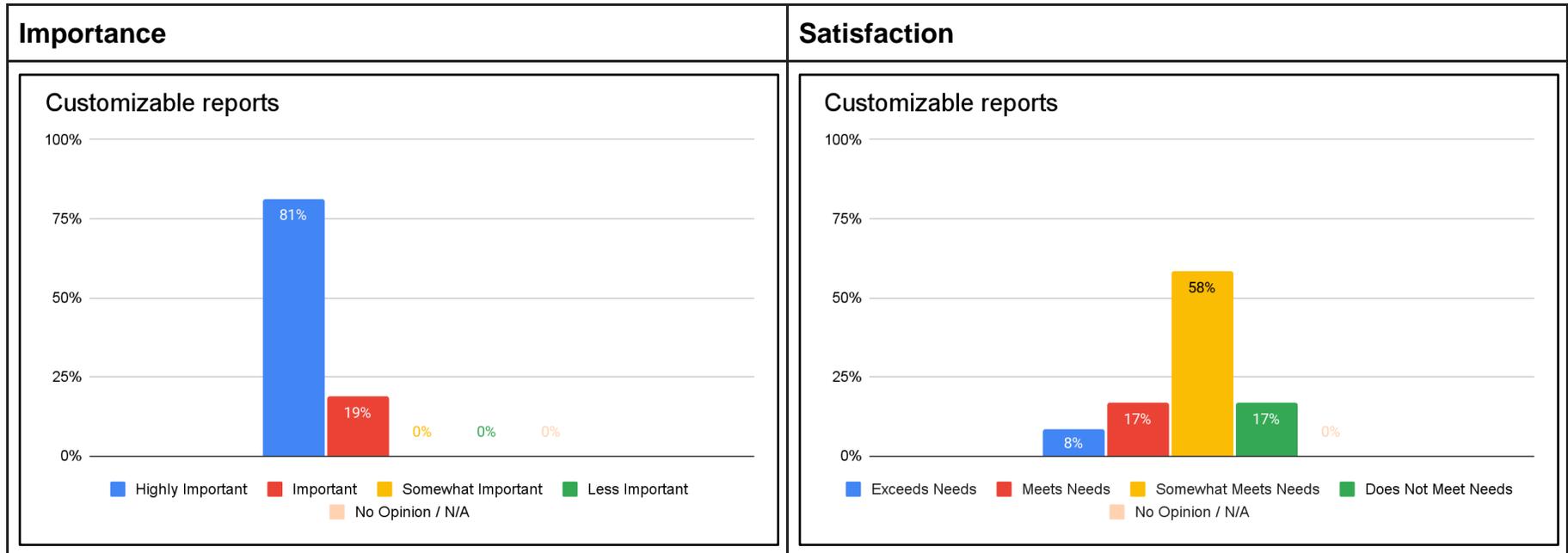
12.8.3. Interlibrary Loan Comments

| Importance | Satisfaction |
|--|---|
| <ul style="list-style-type: none"><i>We make ILL work without having a separate module for it, so I'm not sure how to rank this.</i> | <ul style="list-style-type: none"><i>We only have one library in our system and we do not currently have interlibrary loan as a service. The board may vote to approve interlibrary loan if there is sufficient patron interest.</i><i>There is no ILL module, so we have a self-created way of tracking them that works, but not well. [Consortium] loans are fairly easy to track.</i><i>We don't use Koha for ILL management at all.</i> |



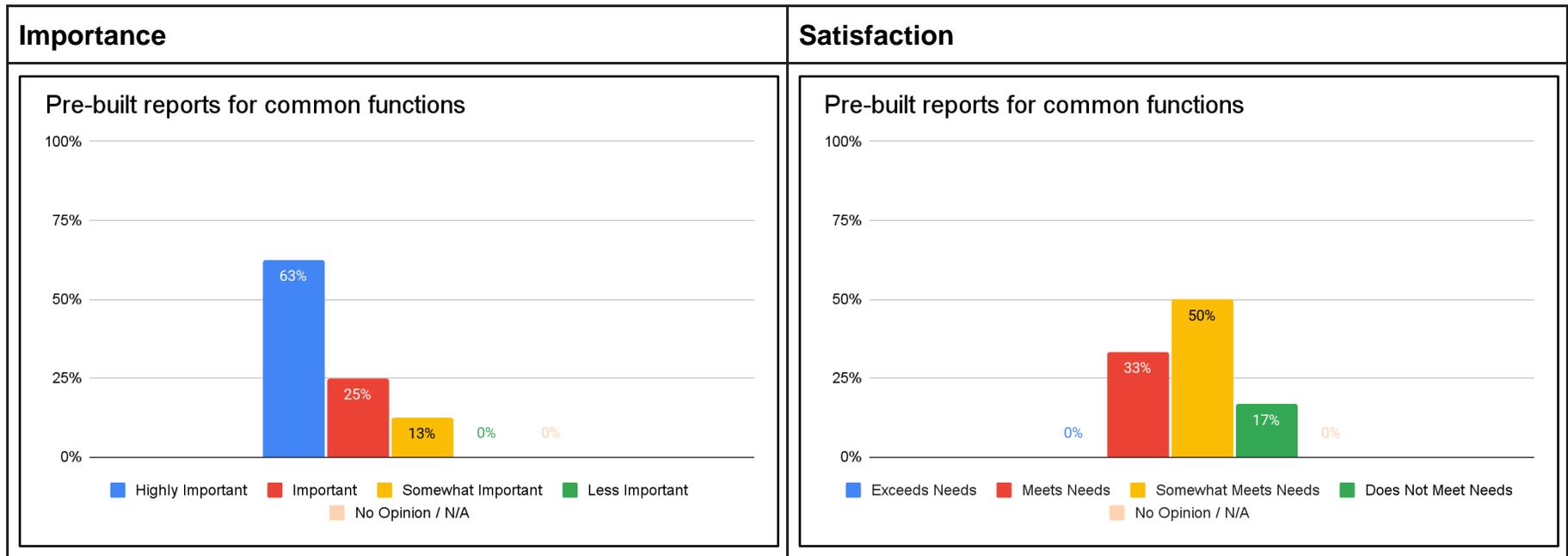
12.9. Reports / Business Intelligence

12.9.1. Customizable reports



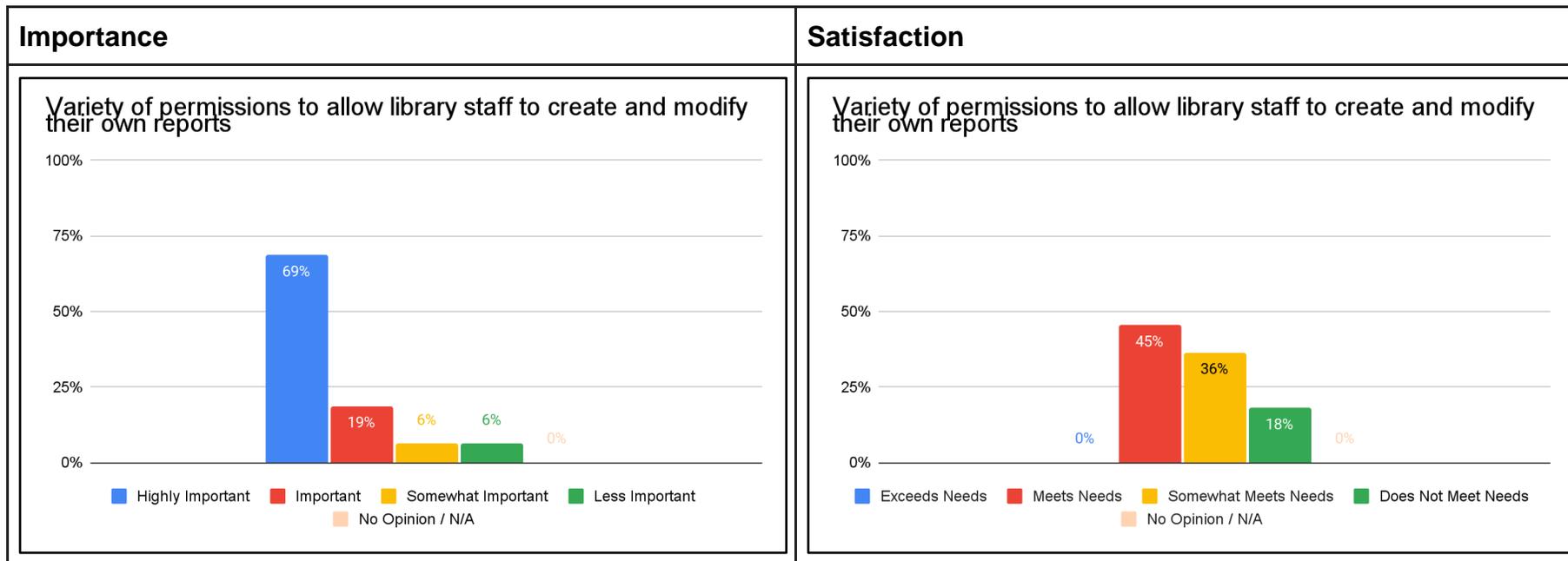


12.9.2. Pre-built reports for common functions



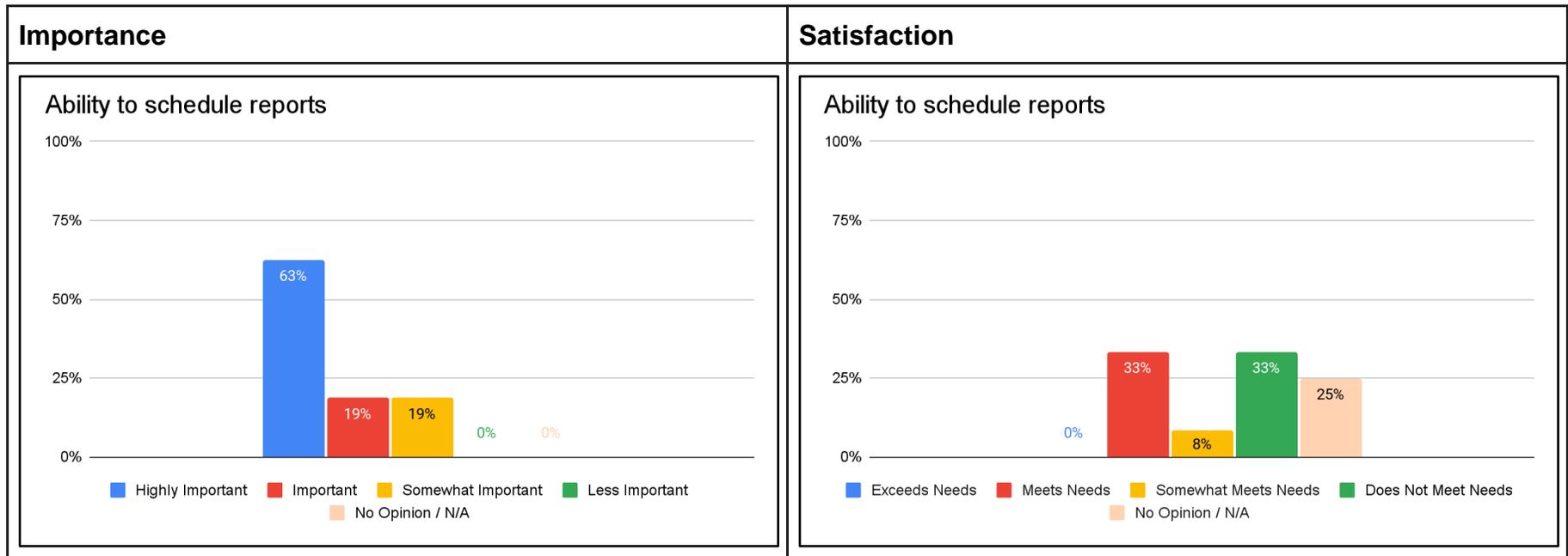


12.9.3. Variety of permissions to allow library staff to create and modify their own reports



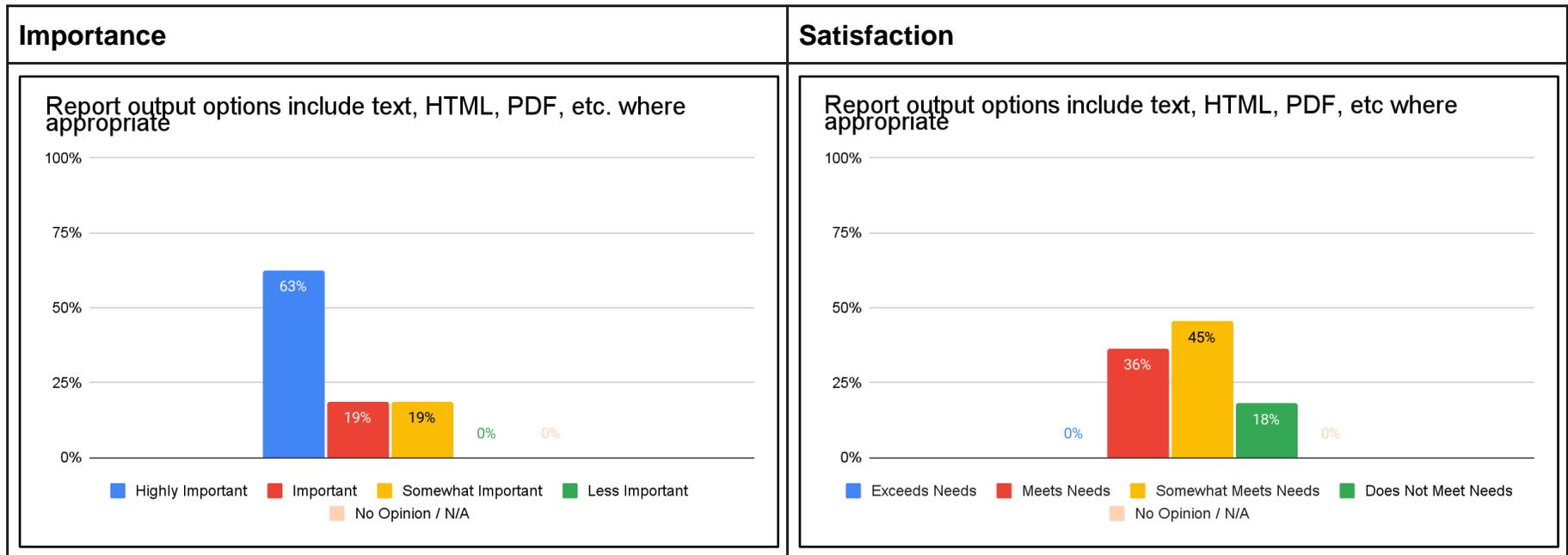


12.9.4. Ability to schedule reports



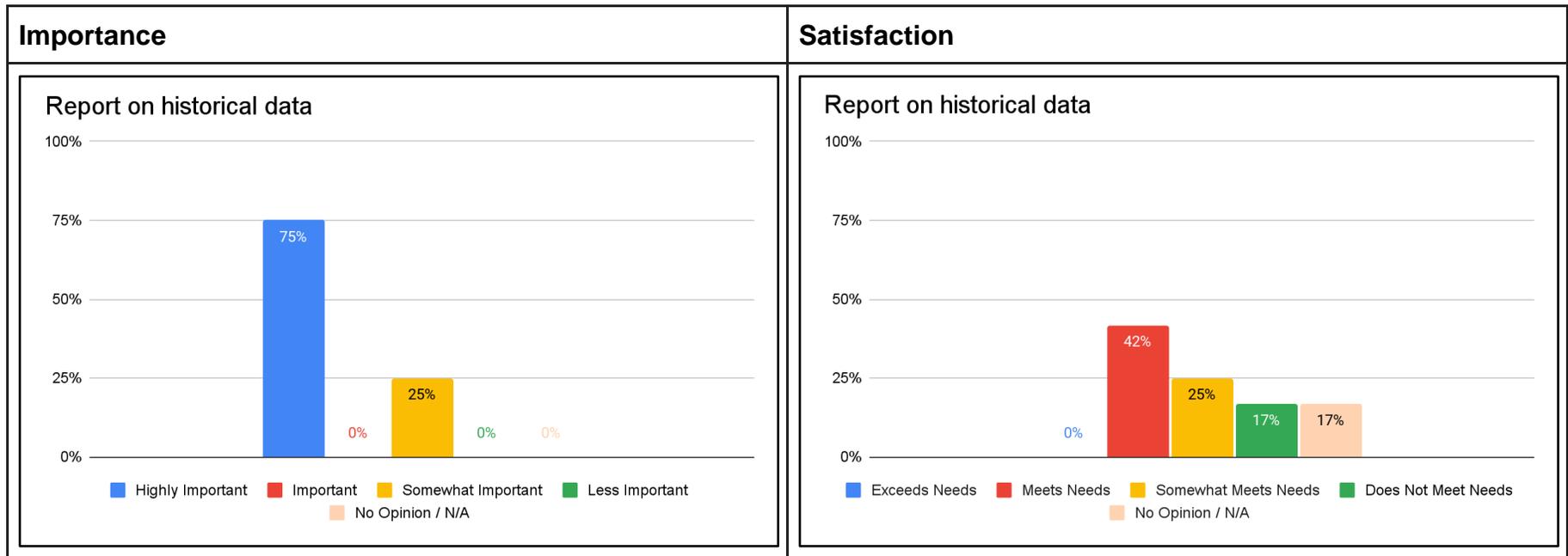


12.9.5. Report output options include text, HTML, PDF, etc. where appropriate



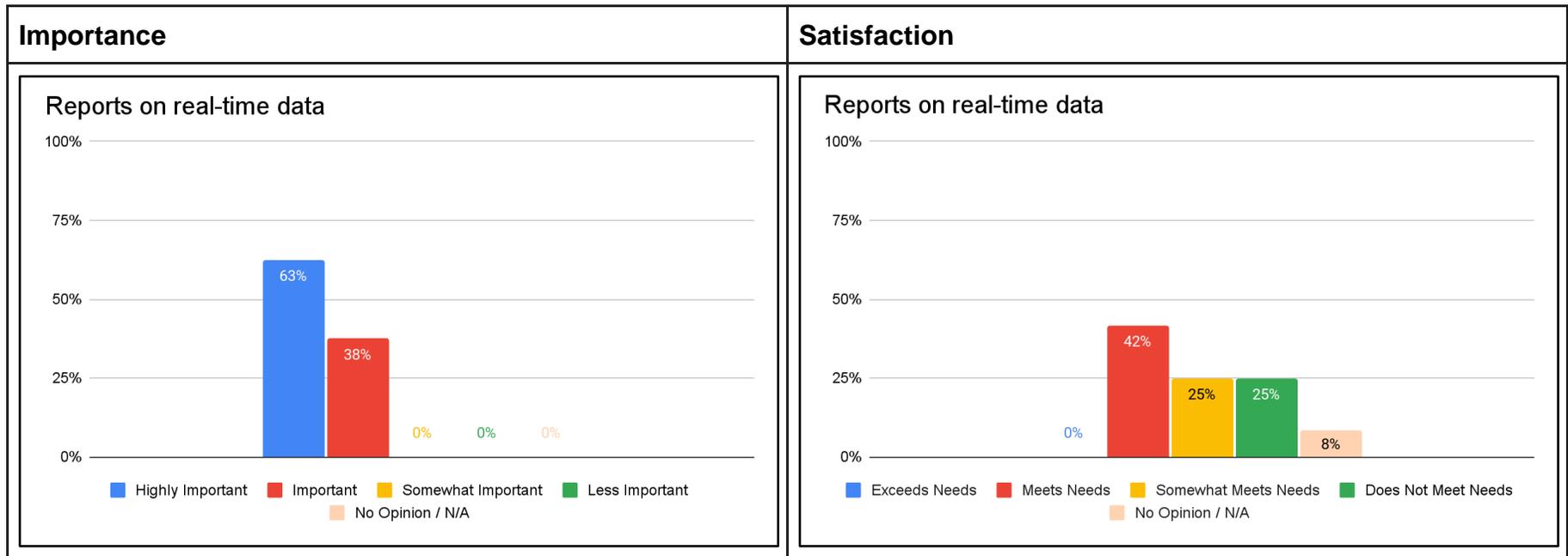


12.9.6. Report on historical data



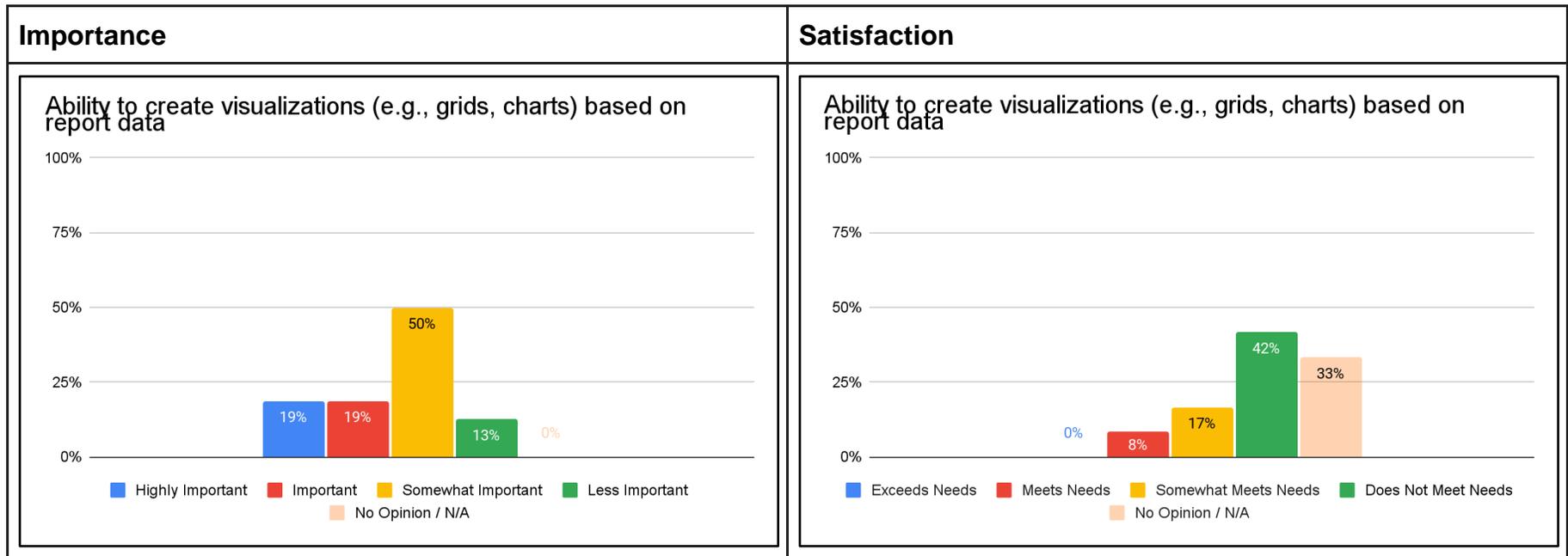


12.9.7. Reports on real-time data



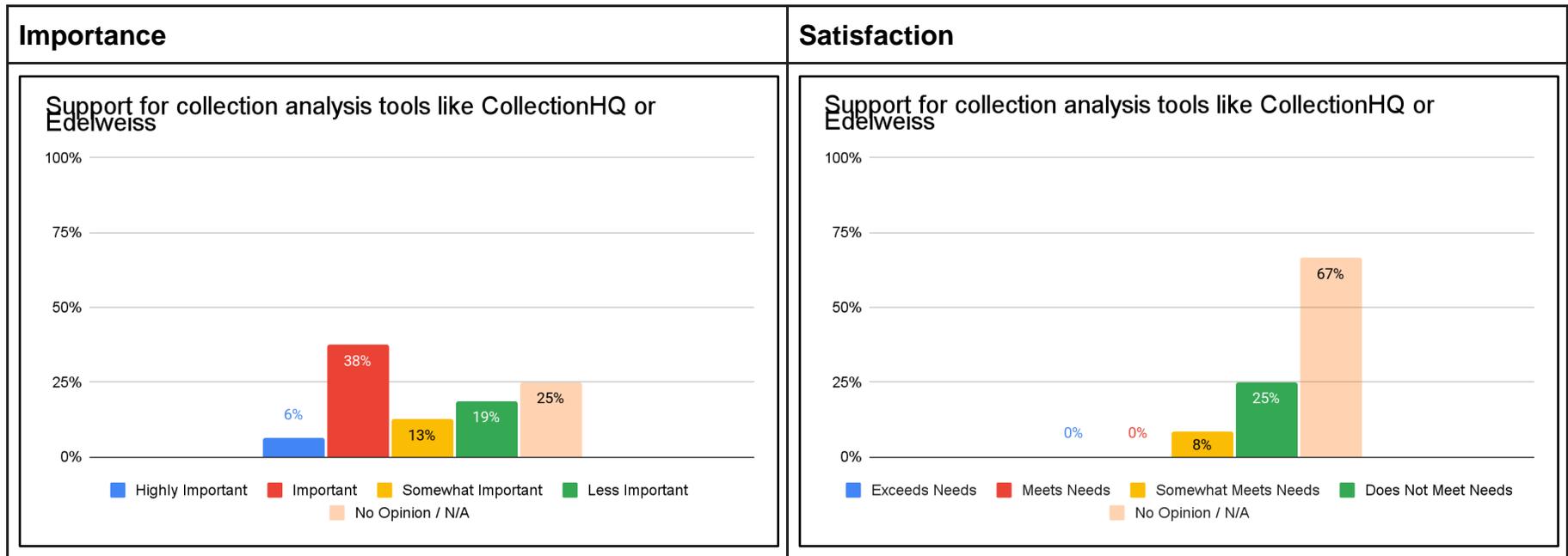


12.9.8. Ability to create visualizations (e.g., grids, charts) based on report data





12.9.9. Support for collection analysis tools like CollectionHQ or Edelweiss





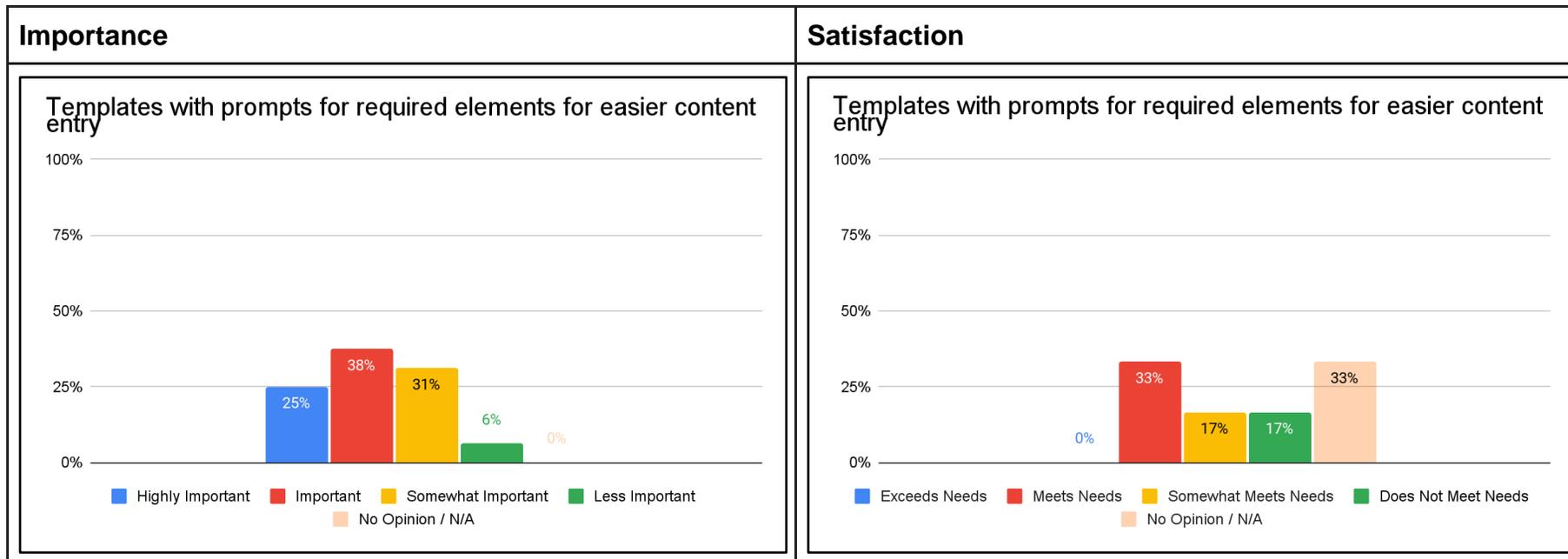
12.9.10. Reports / Business Intelligence Comments

| Importance | Satisfaction |
|--|---|
| <ul style="list-style-type: none"> • <i>Being able to create reports, and have a shared library of pre-created reports, is very important.</i> • <i>Report output options to include spreadsheets.</i> | <ul style="list-style-type: none"> • <i>While Koha can create many useful reports, it is difficult to customize them in ways that are useful. For example, if we want to know which items have not been borrowed lately we can get a list of call numbers but not a list of titles or barcodes.</i> • <i>Several of the created reports work well, but creating custom reports is a bit confusing. Some of the shared reports don't work.</i> • <i>Report section needs work. You have to know SQL and speak KOHA</i> • <i>Not aware of these functions in Koha</i> • <i>I don't believe I am able to schedule reports. I also don't think our current ILS supports CollectionHQ or similar.</i> |



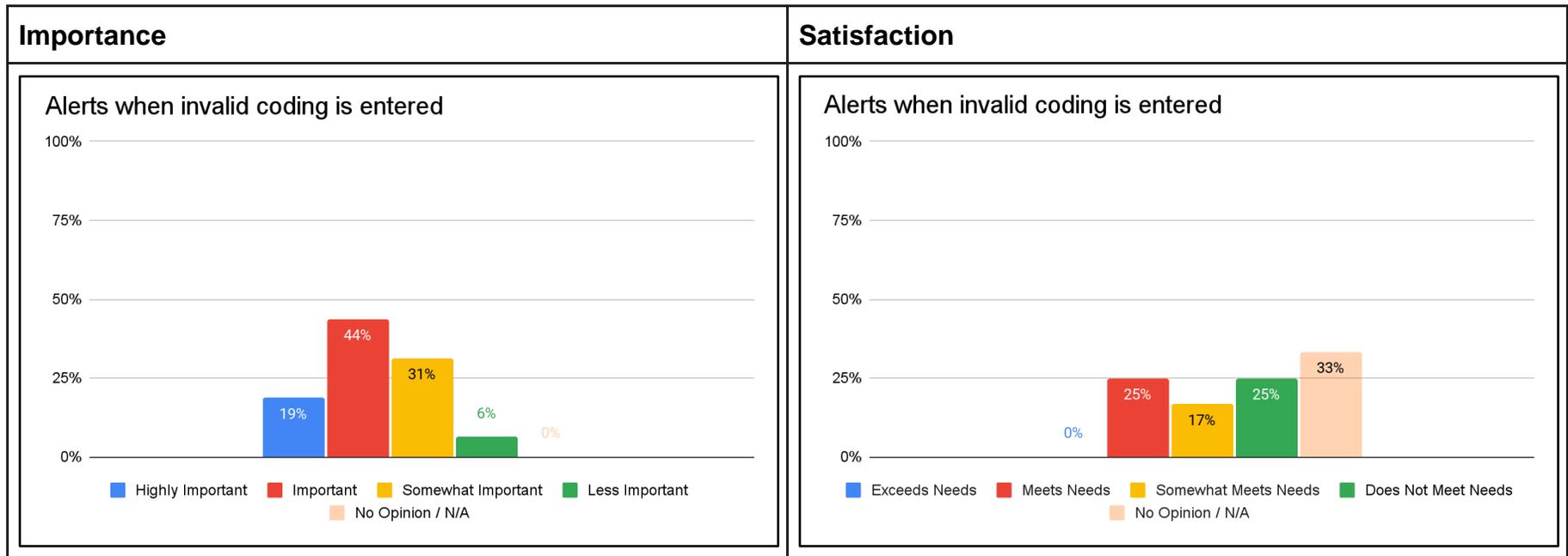
12.10. Serials Management

12.10.1. Templates with prompts for required elements for easier content entry



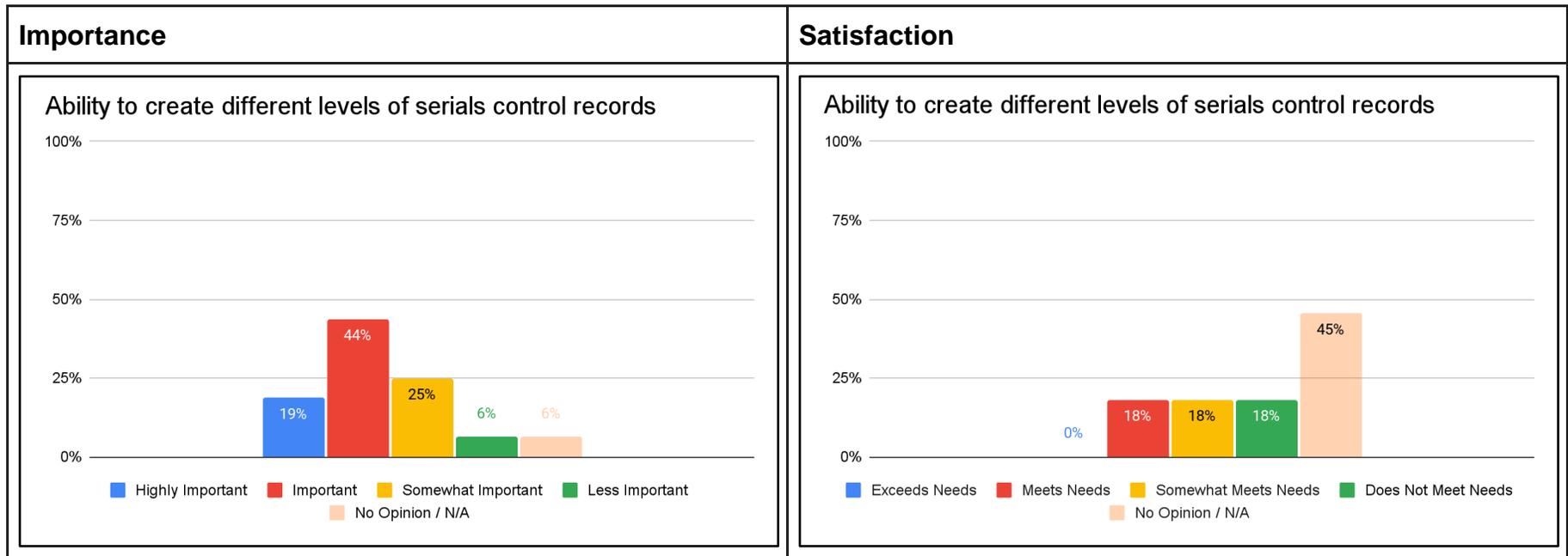


12.10.2. Alerts when invalid coding is entered





12.10.3. Ability to create different levels of serials control records





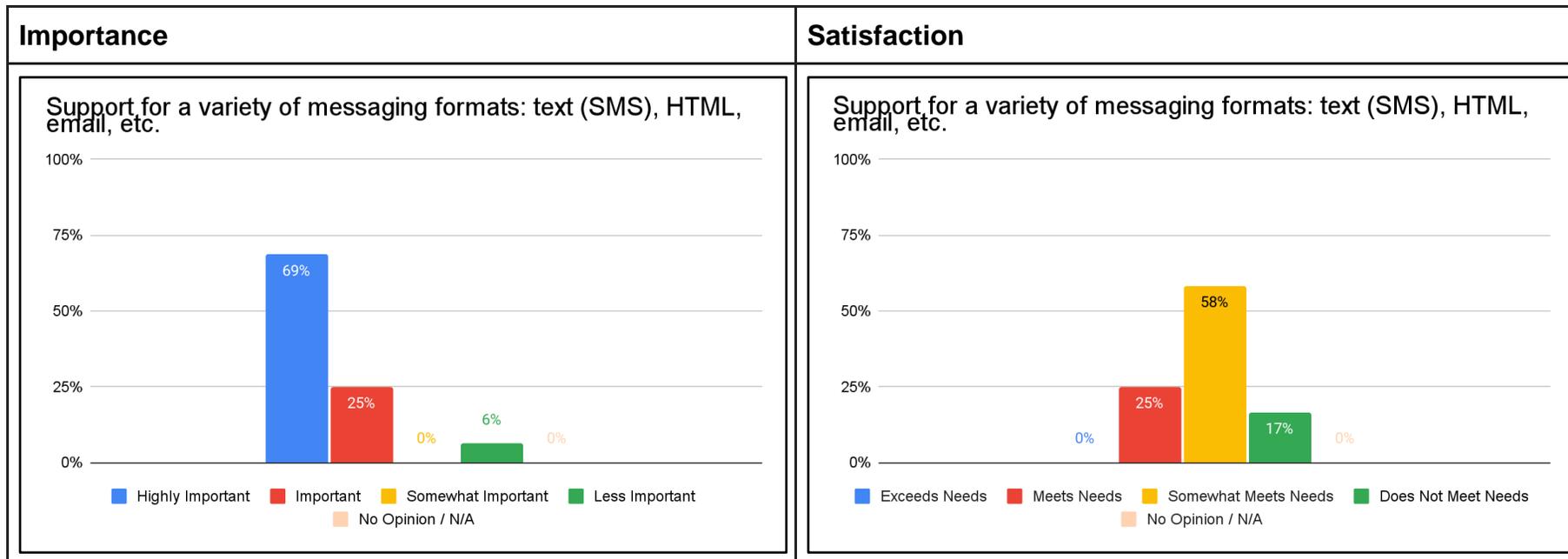
12.10.4. Serials Management Comments

| Importance | Satisfaction |
|--|---|
| <ul style="list-style-type: none"><i>We use serials, but haven't had time to figure out how to use it properly. So I don't know if it would make much difference to have it in a new ILS.</i><i>Only two libraries in [library network] currently use the serials module in Koha.</i> | <ul style="list-style-type: none"><i>We've used the serials report a little bit, but don't know how to use it properly. So currently it may not work due to user error.</i> |



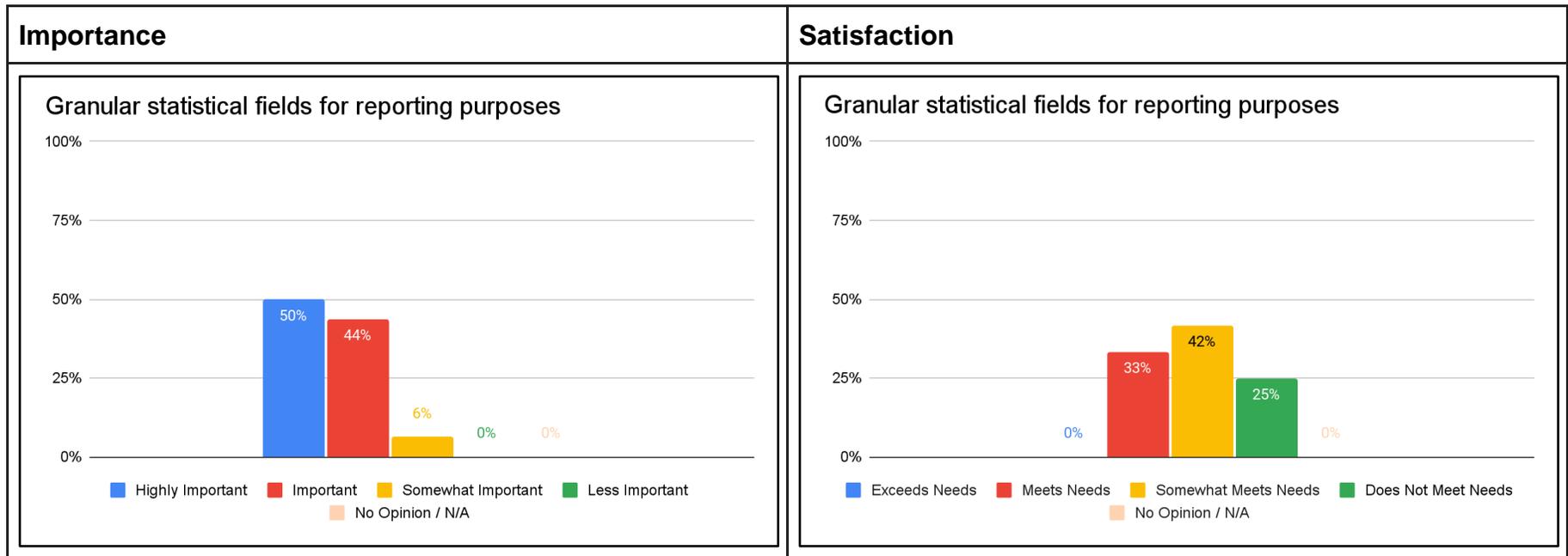
12.11. User Management

12.11.1. Support for a variety of messaging formats: text (SMS), HTML, email, etc.



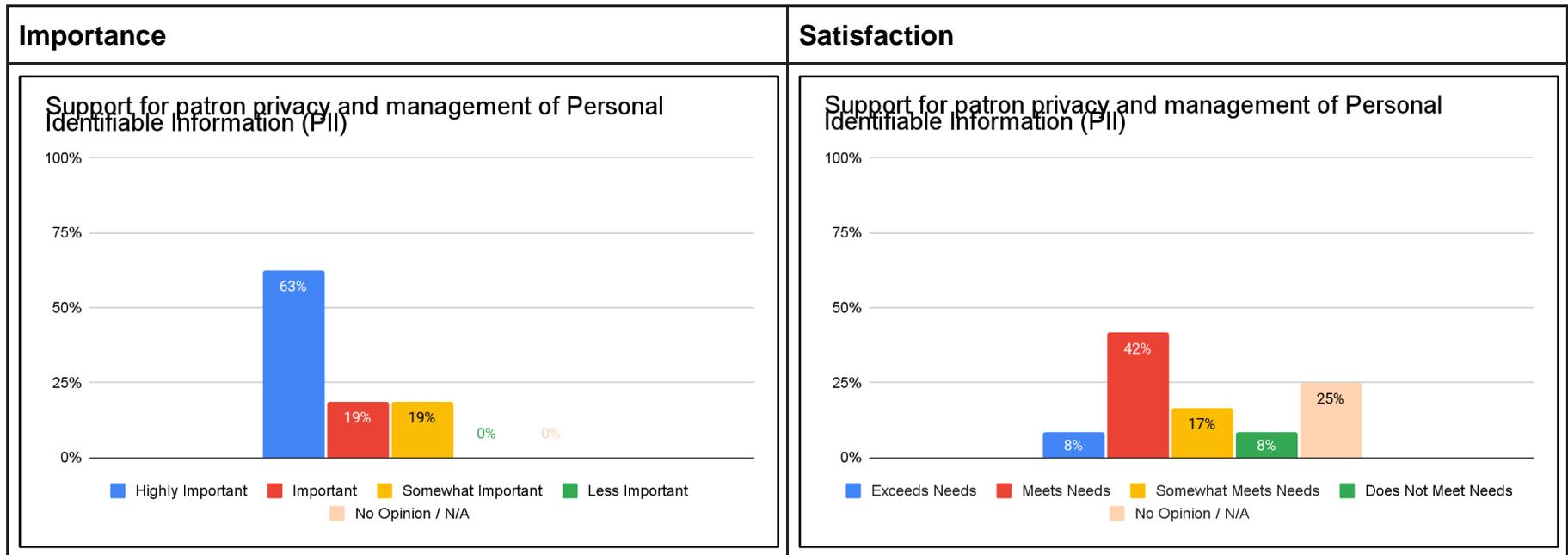


12.11.2. Granular statistical fields for reporting purposes



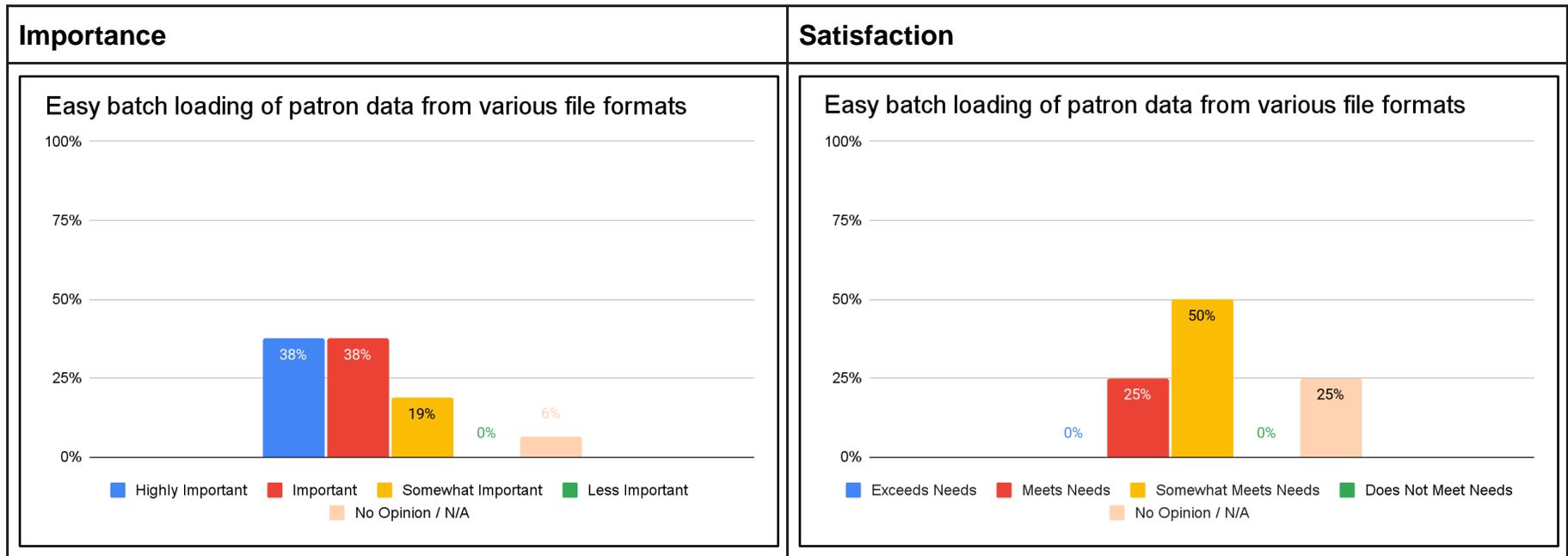


12.11.3. Support for patron privacy and management of Personal Identifiable Information (PII)





12.11.4. Easy batch loading of patron data from various file formats





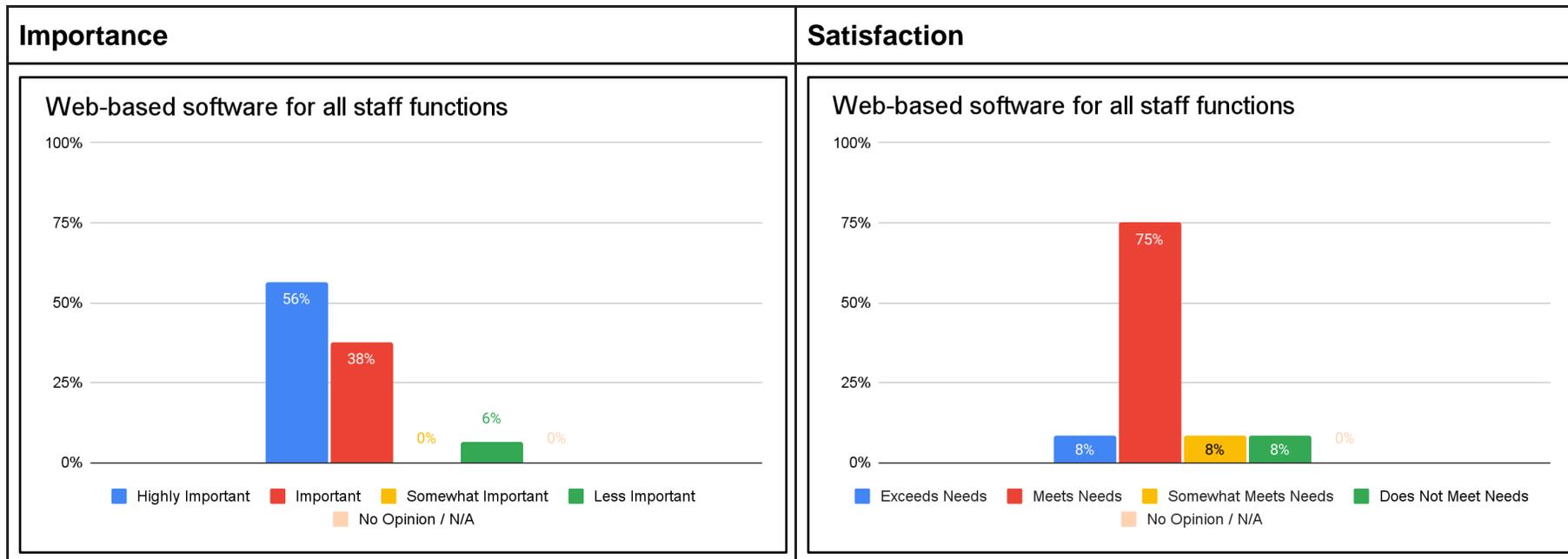
12.11.5. User Management Comments

| Importance | Satisfaction |
|--|--|
| <ul style="list-style-type: none">• <i>Patrons like different notification options, so it would be great to have them.</i> | <ul style="list-style-type: none">• <i>Koha's statistical reports have data that overlap each other and generally do not align well. For example, when generating circulation statistics by age category we get information about YA, adult, and juvenile checkouts but some of these categories incorrectly overlap in Koha so staff always needs to go through the reports in detail and redo Koha's math so that it makes sense and the same items are not counted more than once. It would be helpful if the ILS would figure these issues out on its own.</i>• <i>Koha doesn't have a way to send text message notices, which would be great.</i>• <i>Many messaging formats are supported, but cost extra or require third-party software.</i> |



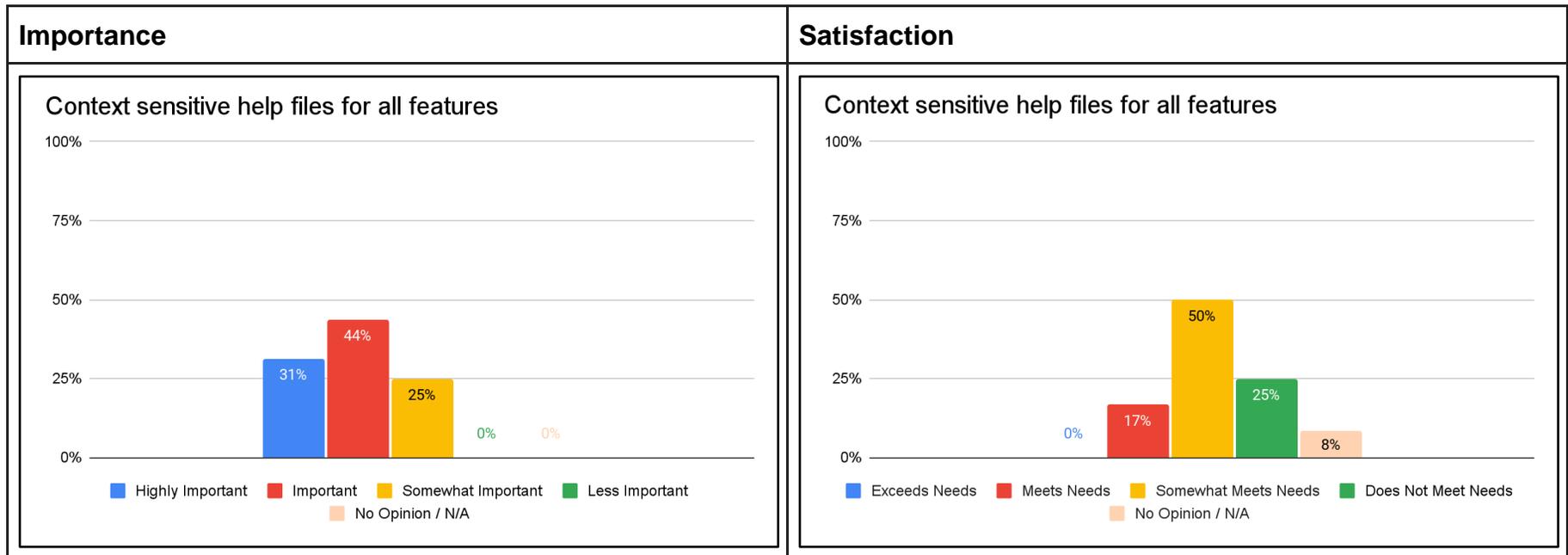
12.12. Staff Client / Software for Accessing the Library System Functions

12.12.1. Web-based software for all staff functions





12.12.2. Context sensitive help files for all features



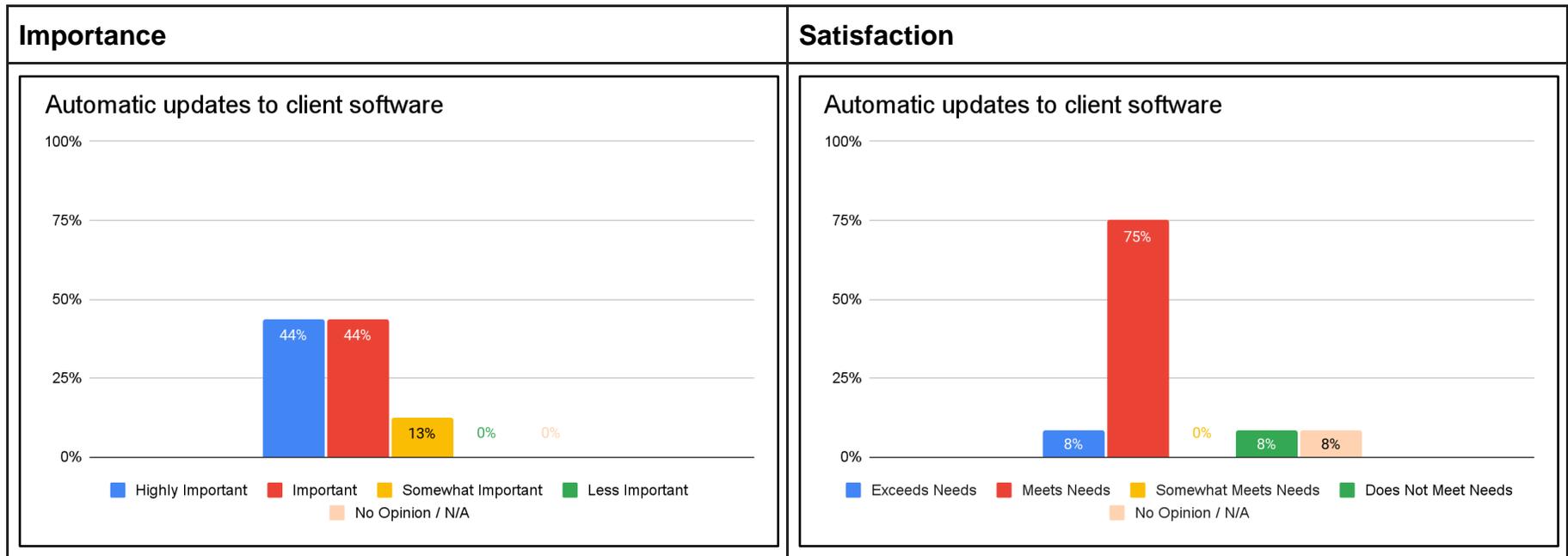


12.12.3. Training materials, self-paced learning modules and other technical support tools for staff





12.12.4. Automatic updates to client software



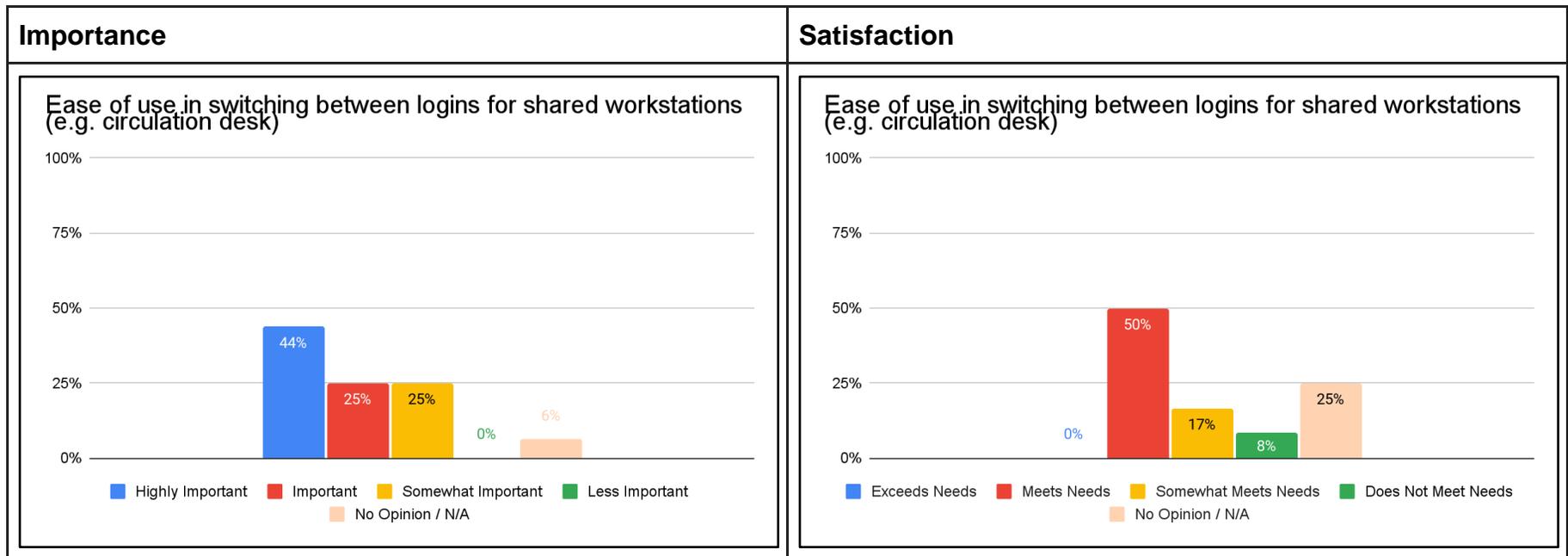


12.12.5. Ability to customize the look and feel and default options, etc. for each login



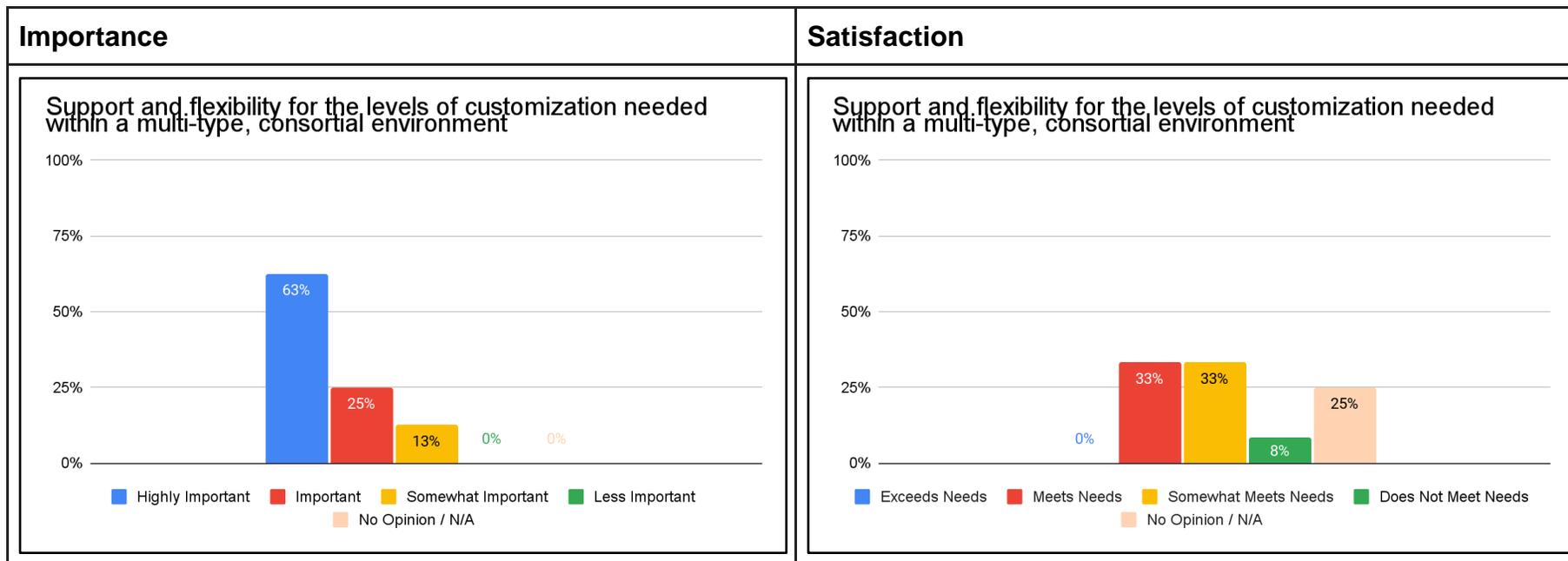


12.12.6. Ease of use in switching between logins for shared workstations (e.g., circulation desk)





12.12.7. Support and flexibility for the levels of customization needed within a multi-type, consortial environment



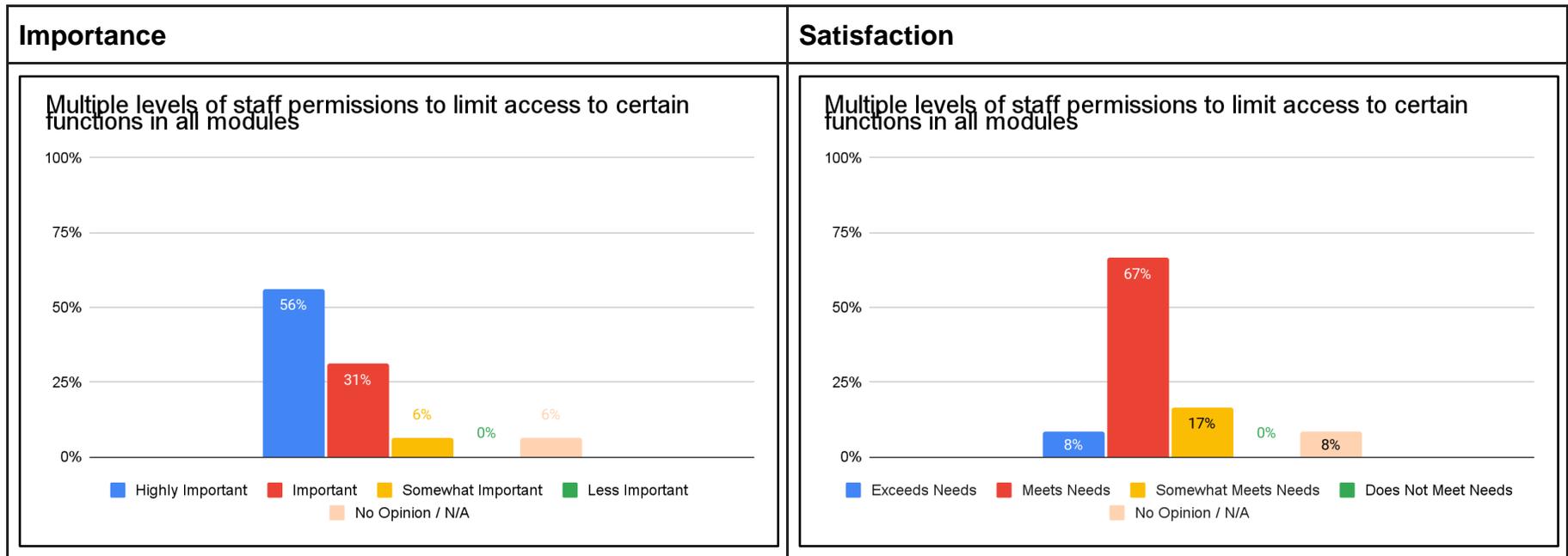


12.12.8. Ability for library staff to manage local settings such as library closed days, messaging, loan periods, etc.





12.12.9. Multiple levels of staff permissions to limit access to certain functions in all modules





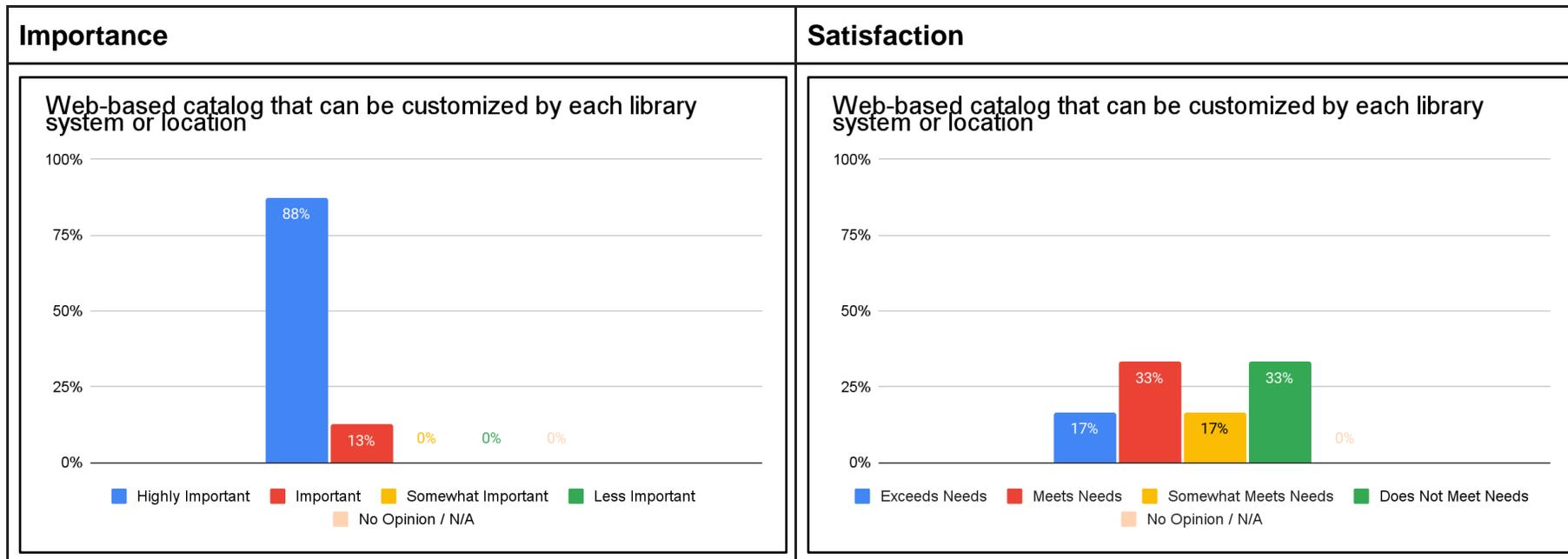
12.12.10. Staff Client / Software for Accessing the Library System Functions Comments

| Importance | Satisfaction |
|--|---|
| <ul style="list-style-type: none"> • <i>Staff currently all share the same login when using our ILS, so many of the features mentioned in this section do not seem relevant.</i> • <i>If I understand "context sensitive help files" correctly...I don't need a direct link to a help file as long as the help files are good.</i> | <ul style="list-style-type: none"> • <i>All our staff use the same login, so some of these questions are not applicable.</i> • <i>The help files for Koha are very unhelpful. We don't need a lot of customization, but a bit would be nice.</i> • <i>The training materials are lacking. Most updates are not automatic. Setting up permissions and managing local settings is onerous.</i> |



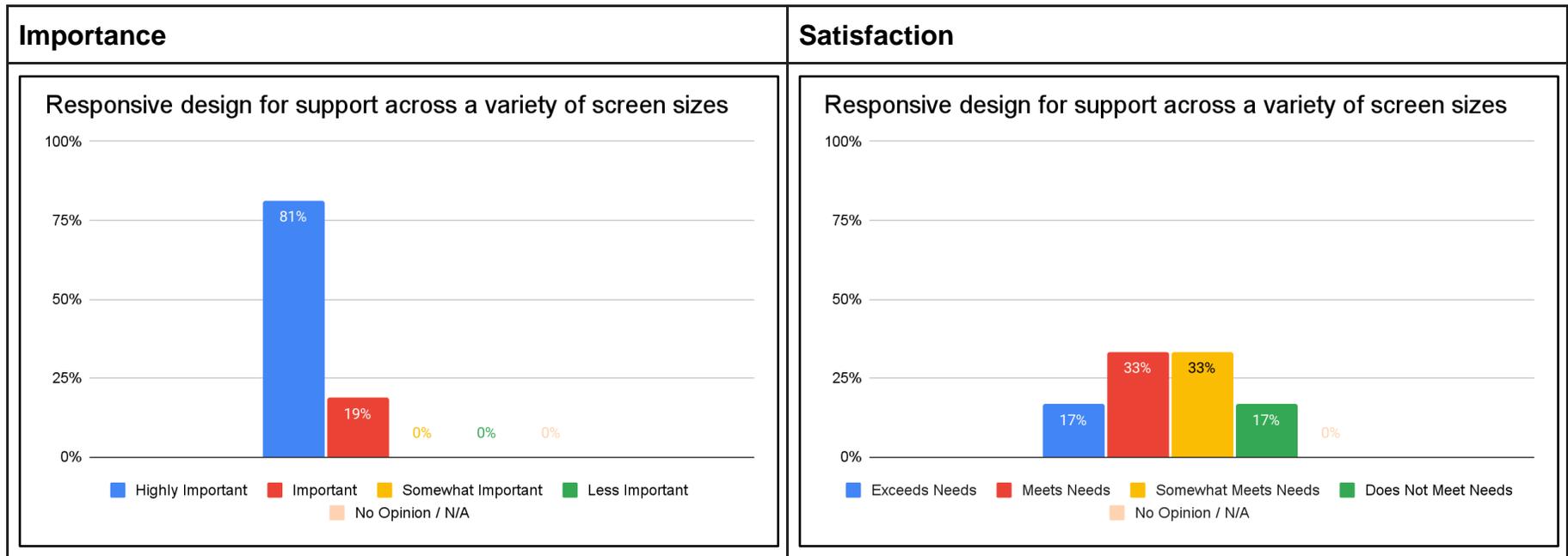
12.13. Online Public Access Catalog (OPAC), Searching, and Discovery

12.13.1. Web-based catalog that can be customized by each library system or location



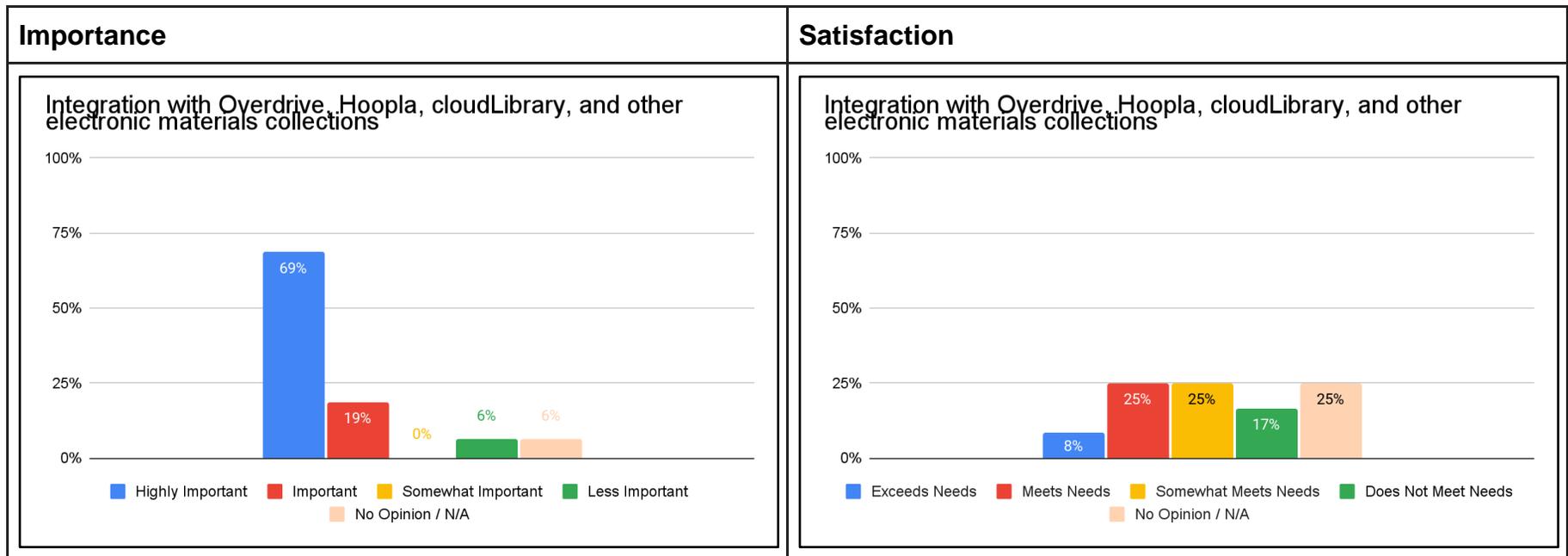


12.13.2. Responsive design for support across a variety of screen sizes



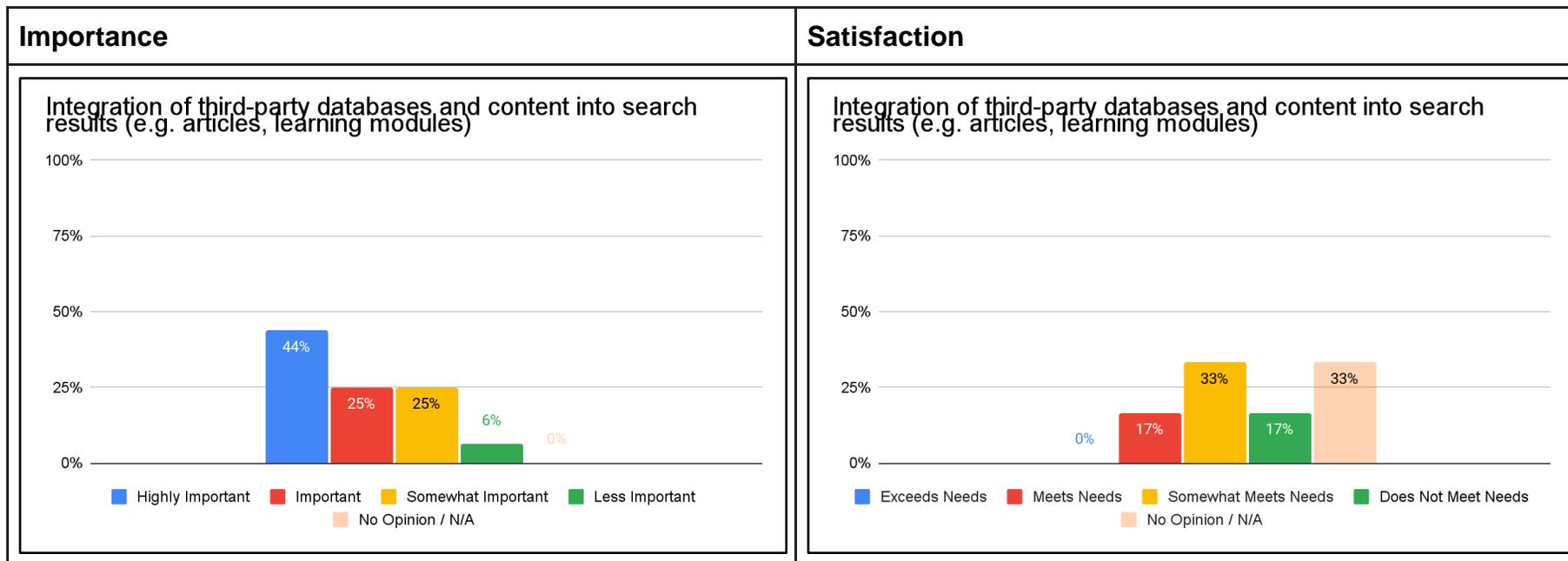


12.13.3. Integration with Overdrive, Hoopla, cloudLibrary, and other electronic materials collections





12.13.4. Integration of third-party databases and content into search results (e.g., articles, learning modules)



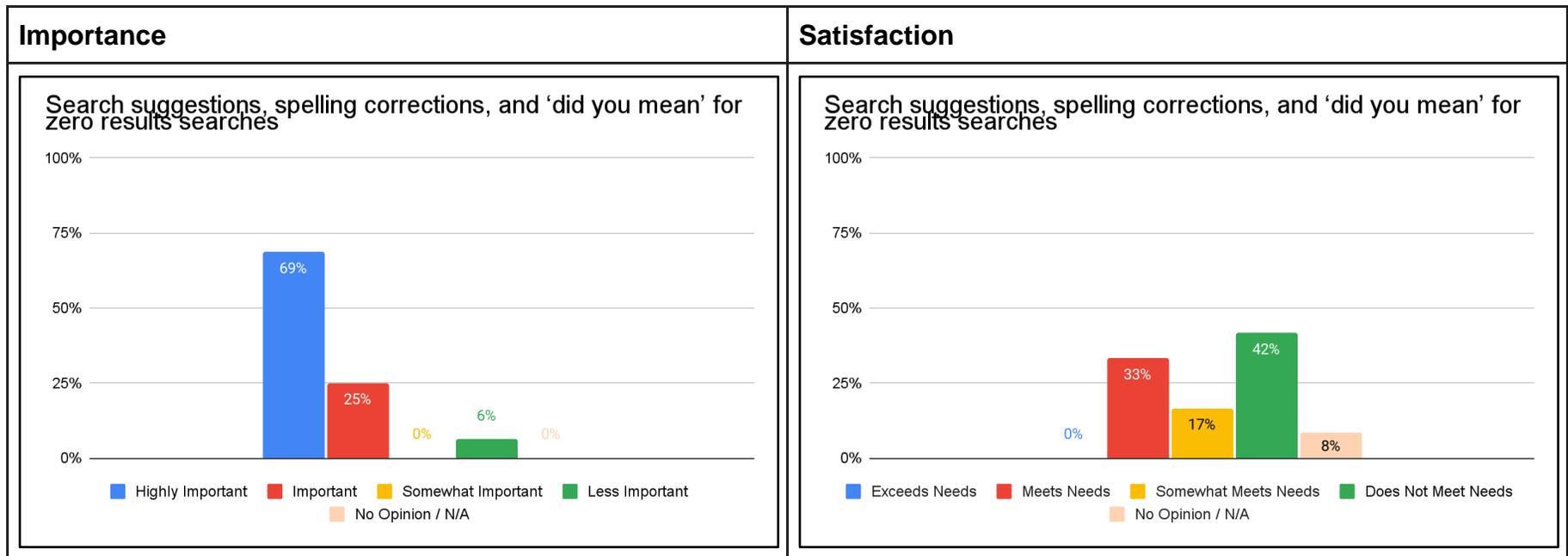


12.13.5. Ability to search other collections (like UW Libraries or Worldcat)



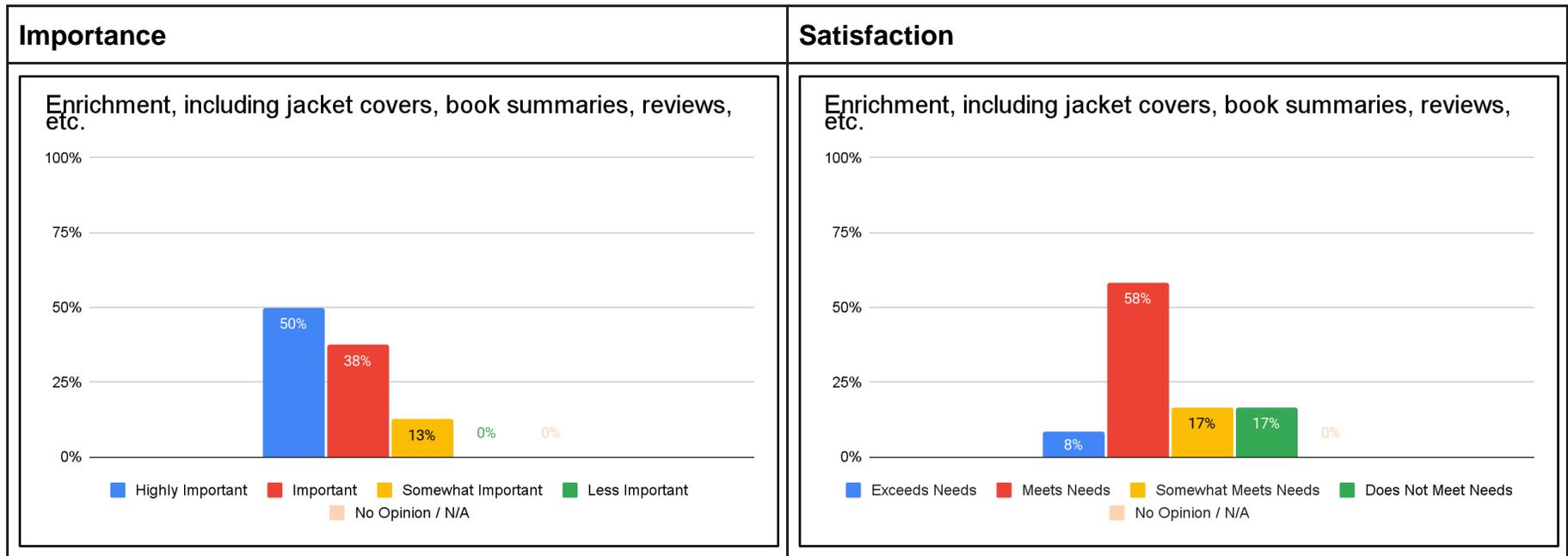


12.13.6. Search suggestions, spelling corrections, and 'did you mean' for zero results searches





12.13.7. Enrichment, including jacket covers, book summaries, reviews, etc.



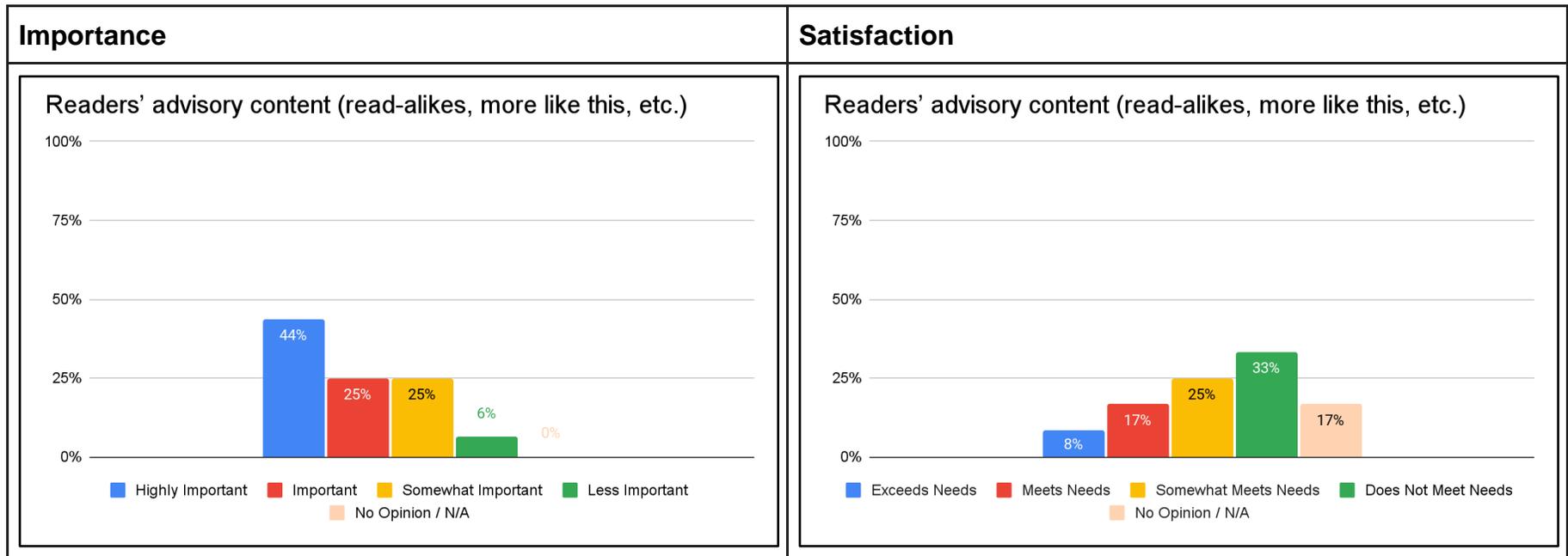


12.13.8. Ability for staff and patrons to add reviews for books and other materials





12.13.9. Readers' advisory content (read-alikes, more like this, etc.)



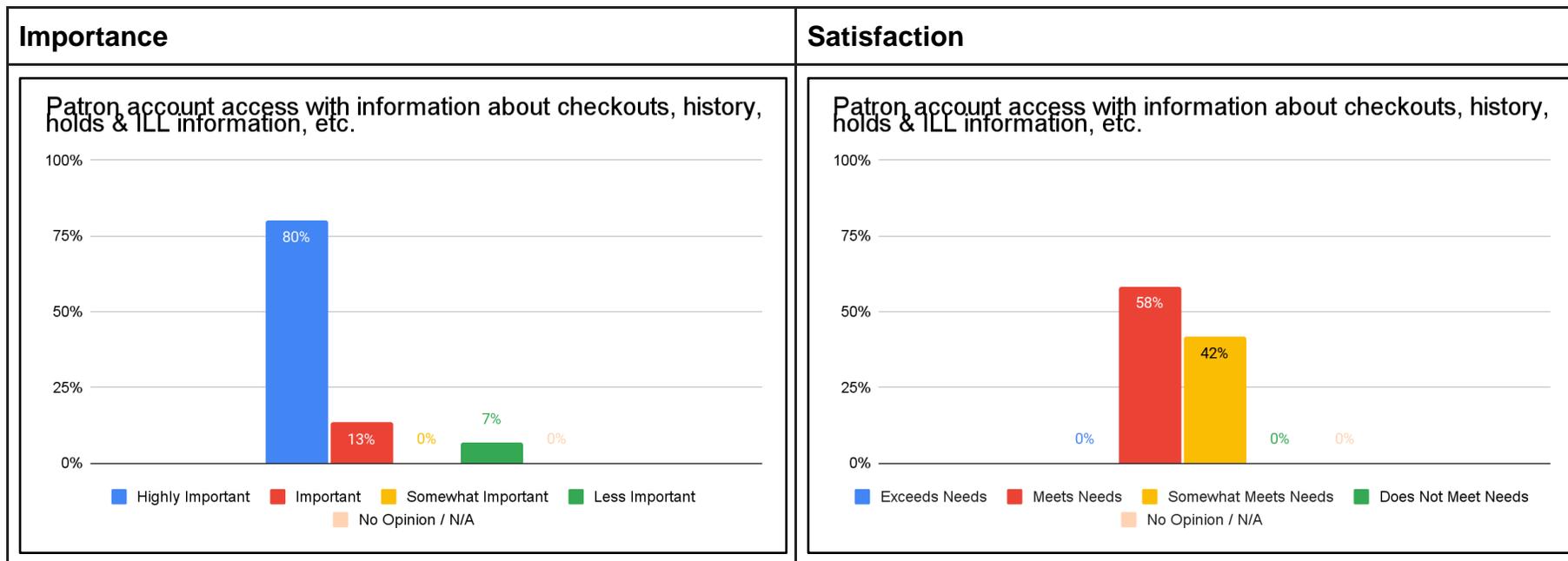


12.13.10. Ability for patrons to place interlibrary loan requests



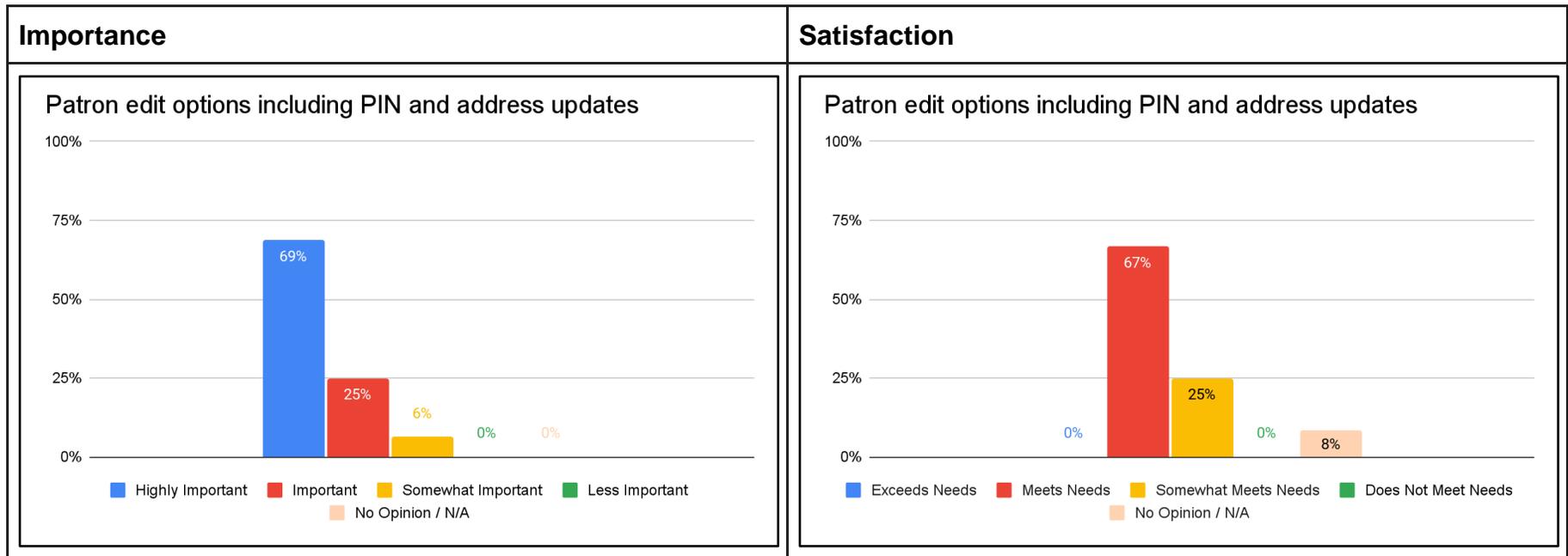


12.13.11. Patron account access with information about checkouts, history, holds & ILL information, etc.



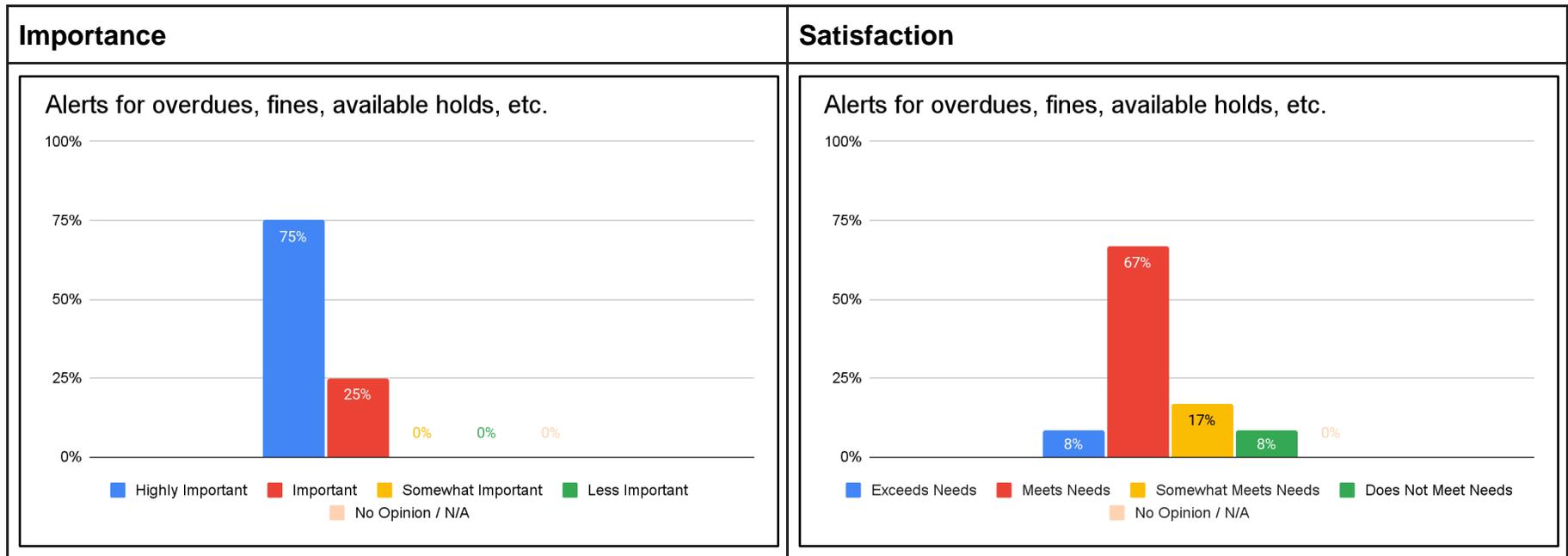


12.13.12. Patron edit options including PIN and address updates



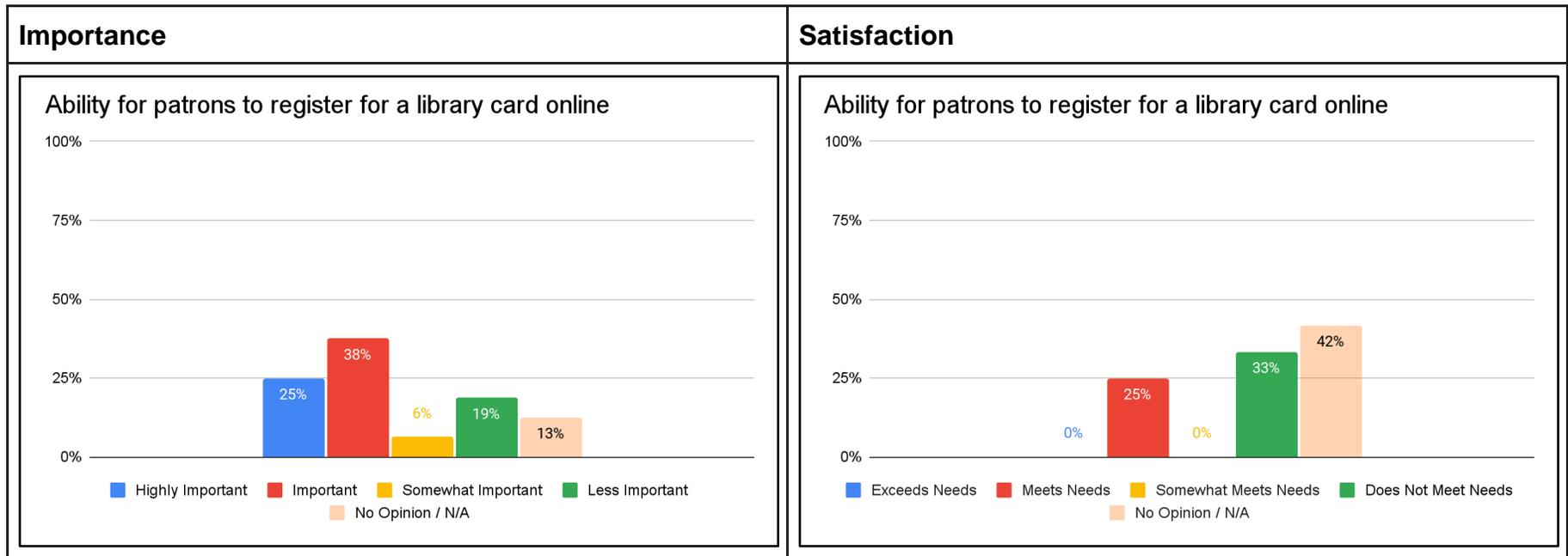


12.13.13. Alerts for overdues, fines, available holds, etc.



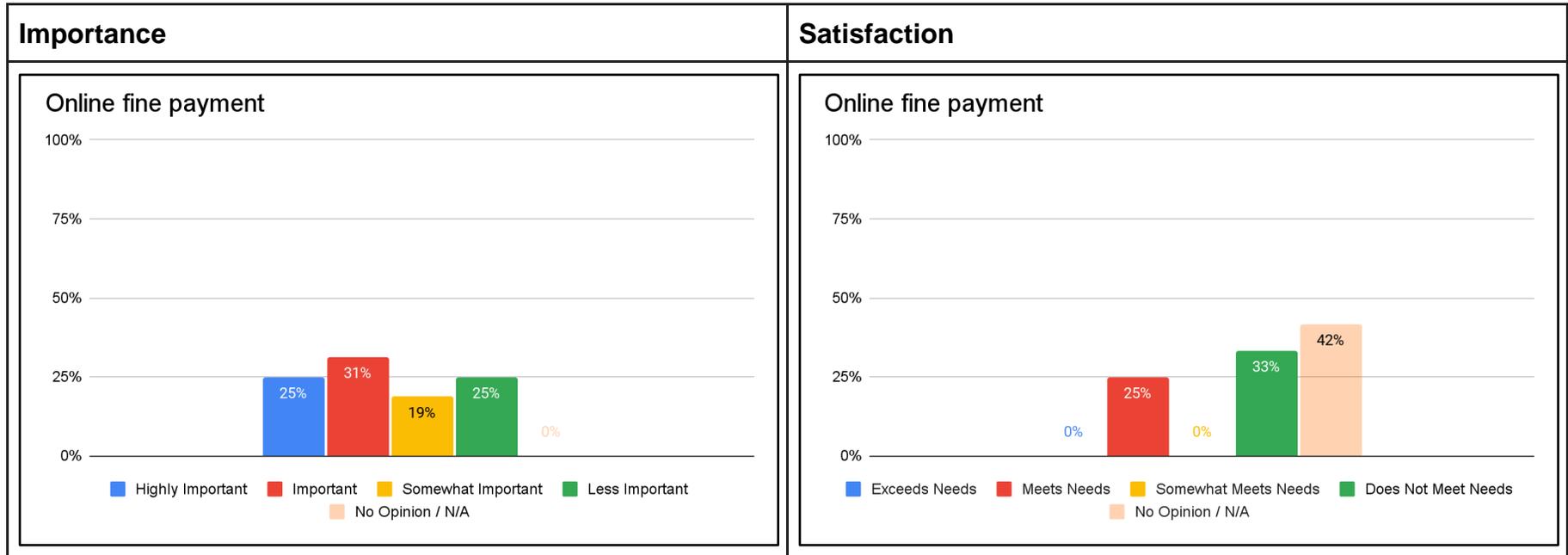


12.13.14. Ability for patrons to register for a library card online



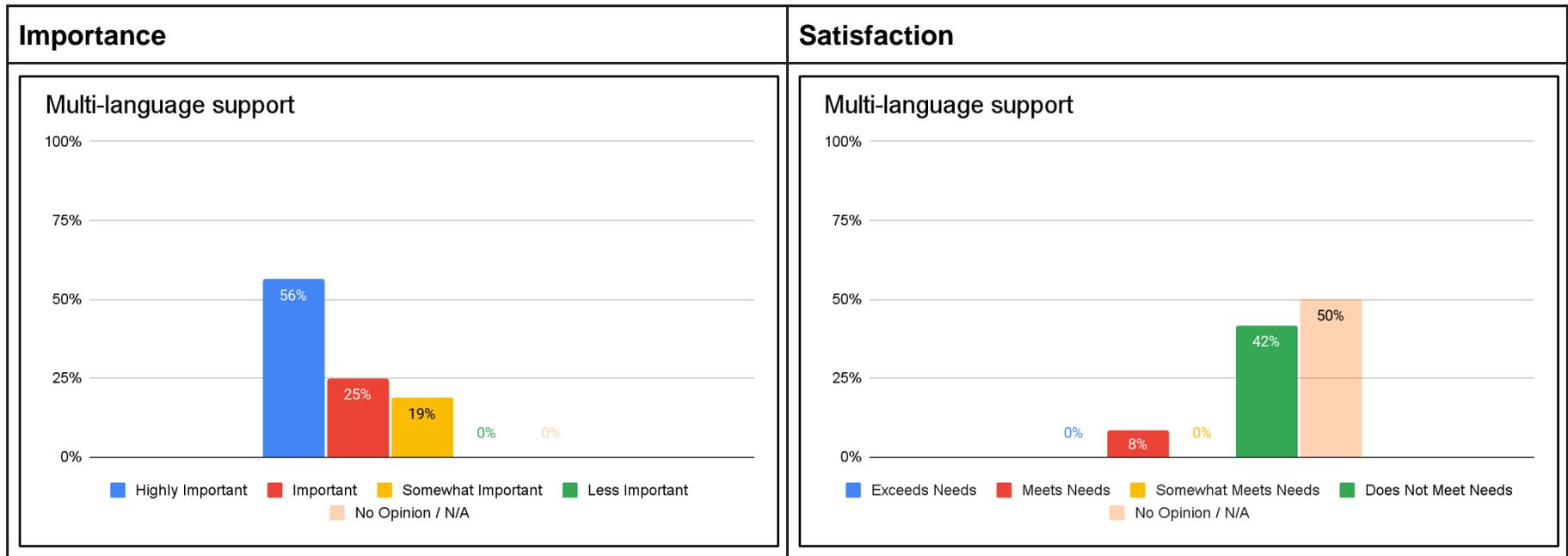


12.13.15. Online fine payment



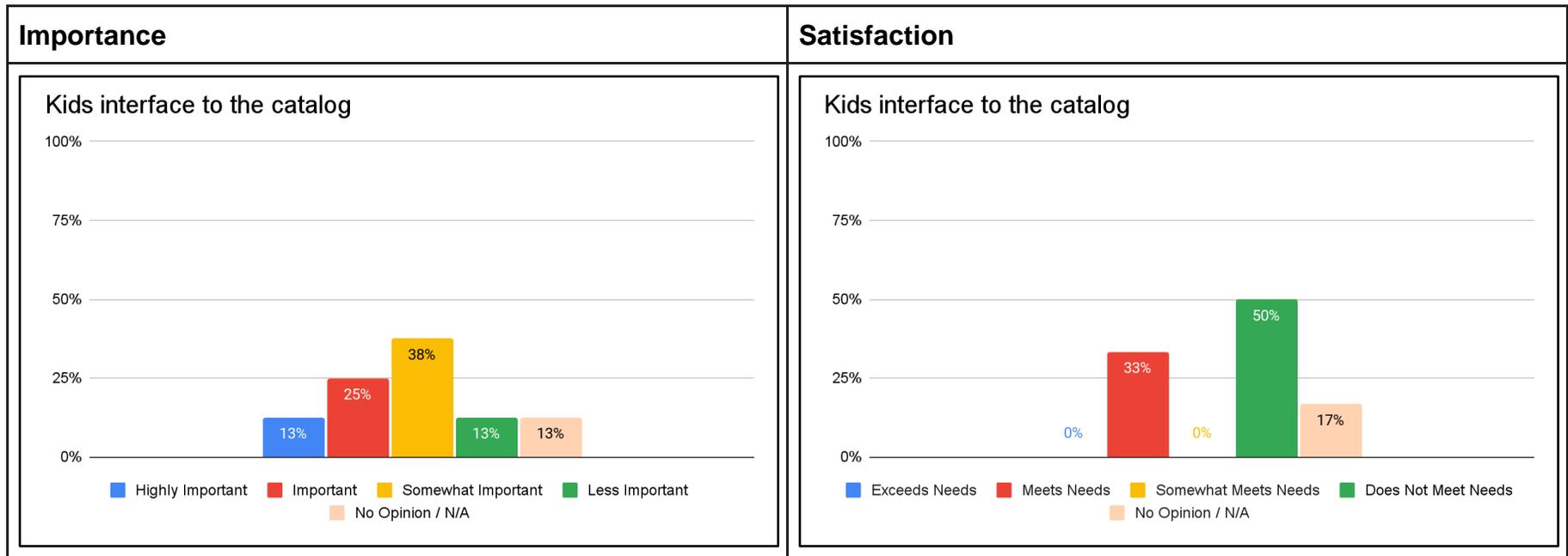


12.13.16. Multi-language support



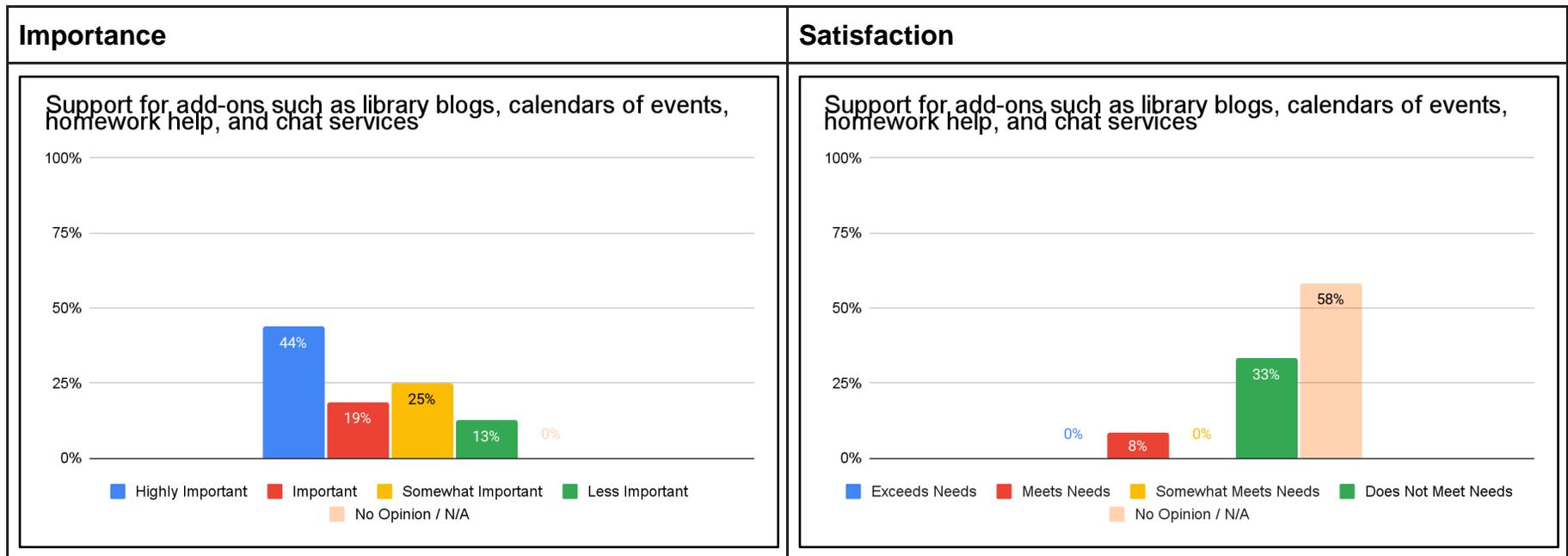


12.13.17. Kids interface to the catalog





12.13.18. Support for add-ons such as library blogs, calendars of events, homework help, and chat services





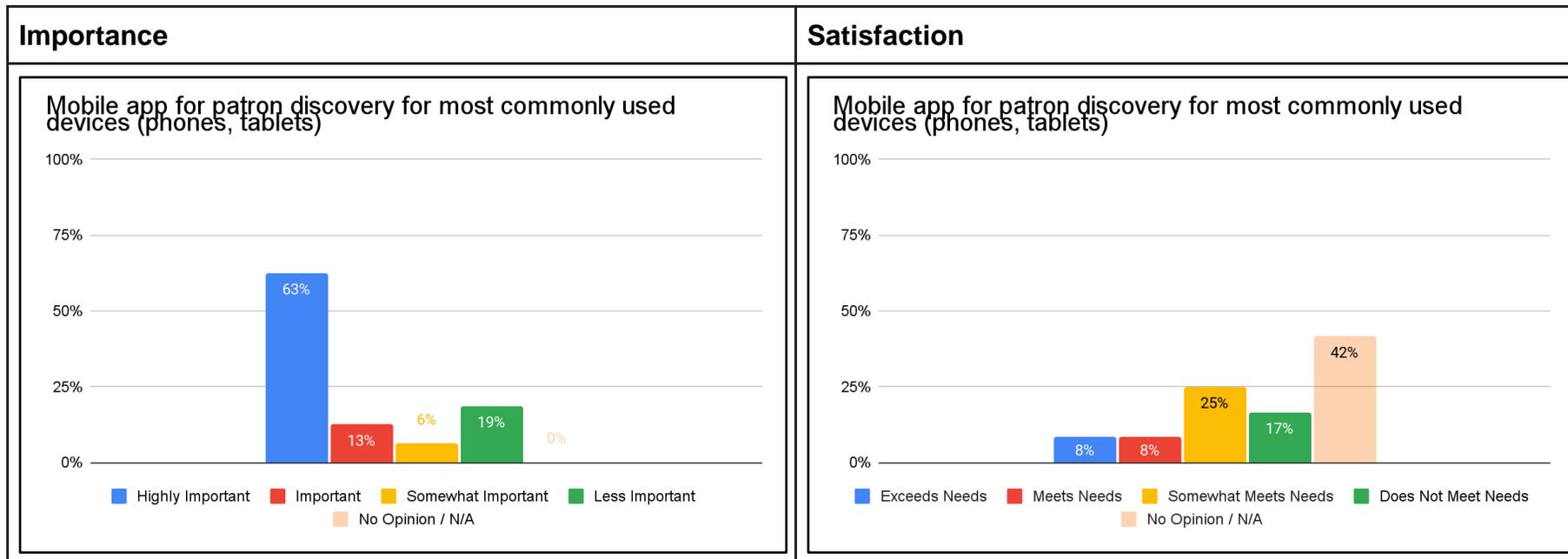
12.13.19. Online Public Access Catalog (OPAC), Searching, and Discovery Comments

| Importance | Satisfaction |
|---|--|
| <ul style="list-style-type: none"><i>I haven't seen an OPAC interface for children that works. I'm not sure that the adult interfaces work all that well. Needs discussion.</i> | <ul style="list-style-type: none"><i>I don't use our public OPAC much. When I did look at it the mobile version doesn't have an easy way to filter results. And it prominently mentions Overdrive results, which we don't have. I would love it if it was easier to bring in jacket covers for records.</i><i>Do not know if these features are available; not using.</i><i>The web design for patrons is confusing and too busy. It rearranges items on smaller screens. If the search is not exactly as what is in the record, it doesn't find it.</i> |



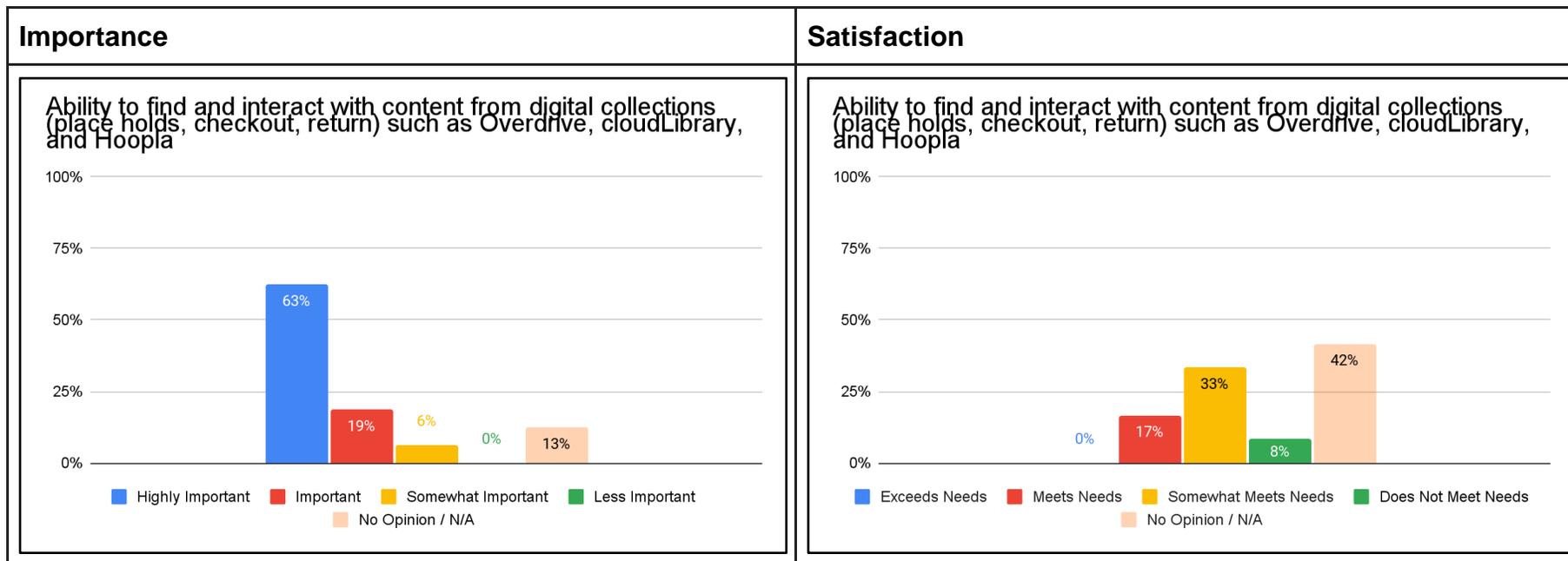
12.14. Mobile Interface for the Library Catalog, Self-Service, and Discovery

12.14.1. Mobile app for patron discovery for most commonly used devices (phones, tablets)



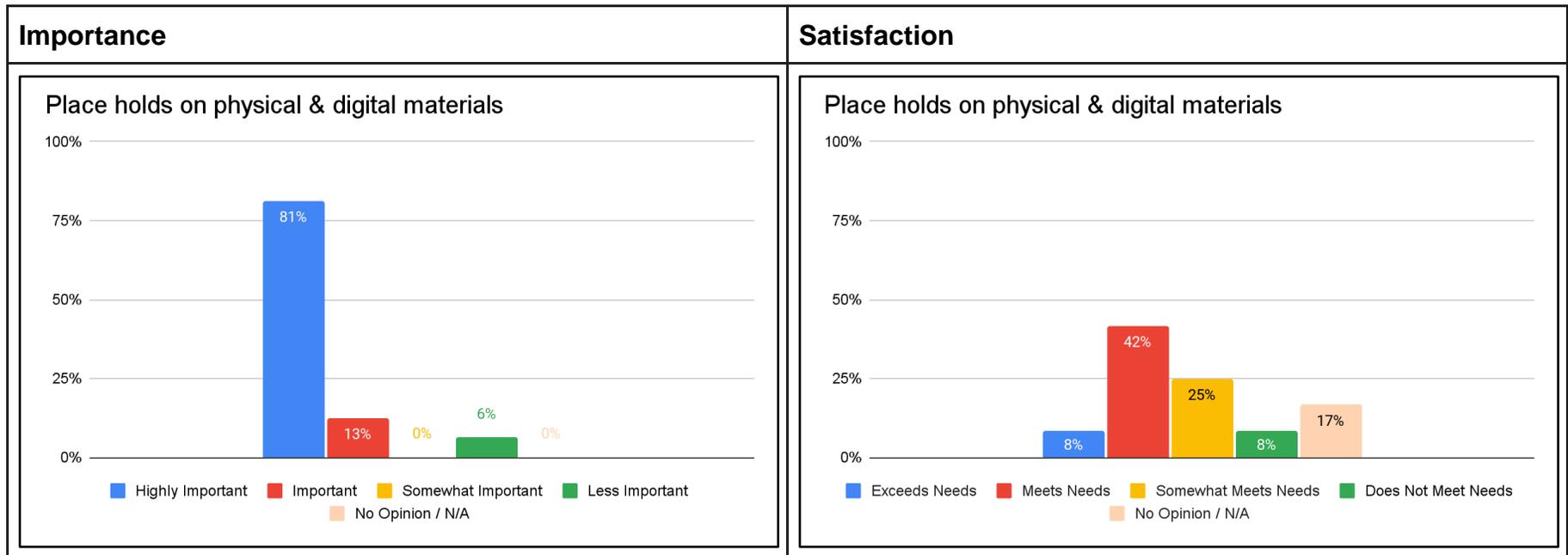


12.14.2. Ability to find and interact with content from digital collections (place holds, checkout, return) such as Overdrive, cloudLibrary, and Hoopla



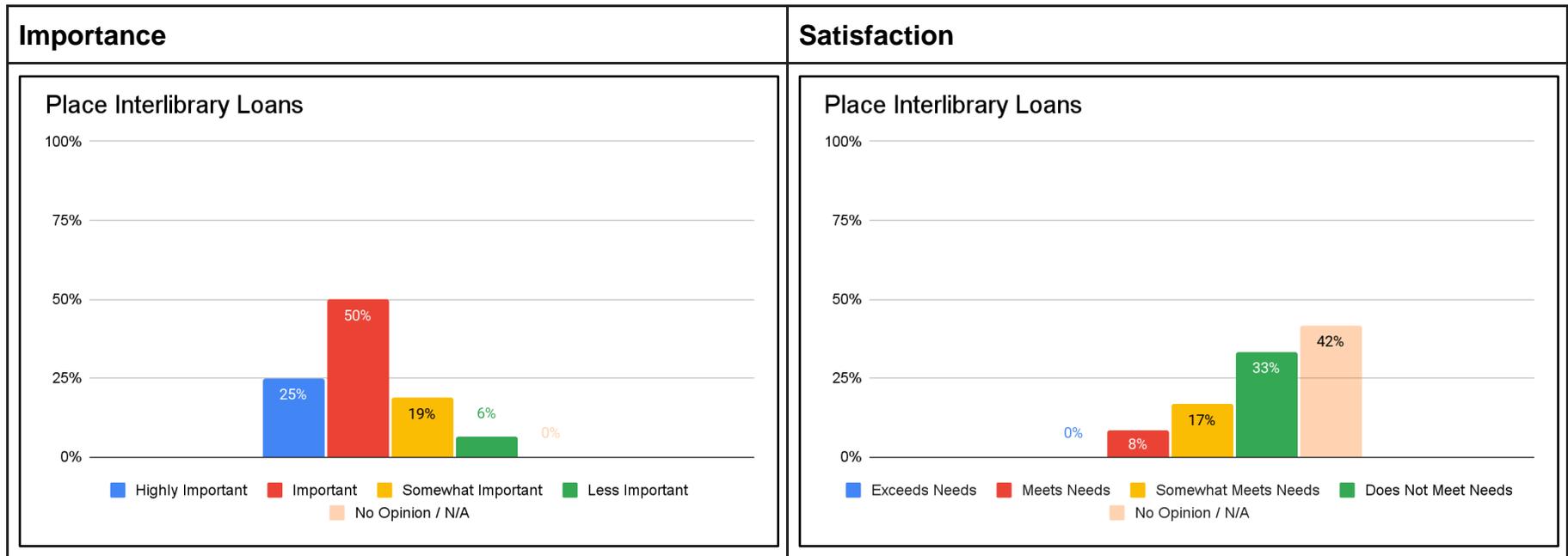


12.14.3. Place holds on physical & digital materials



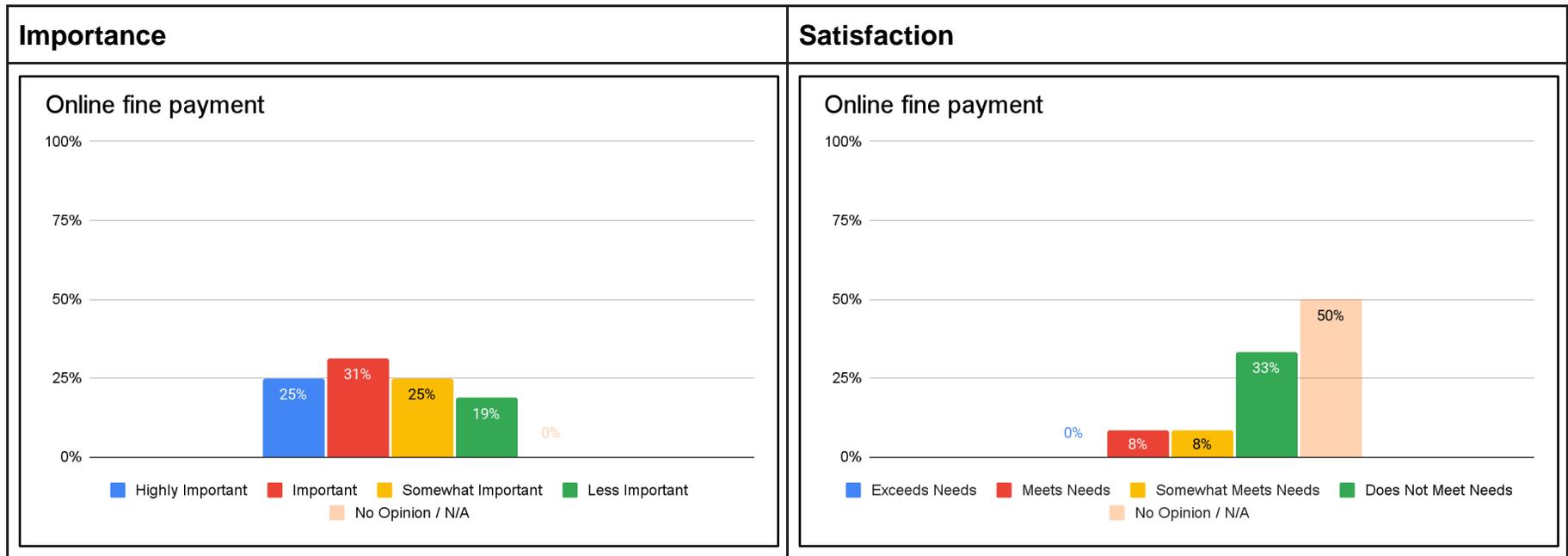


12.14.4. Place Interlibrary Loans



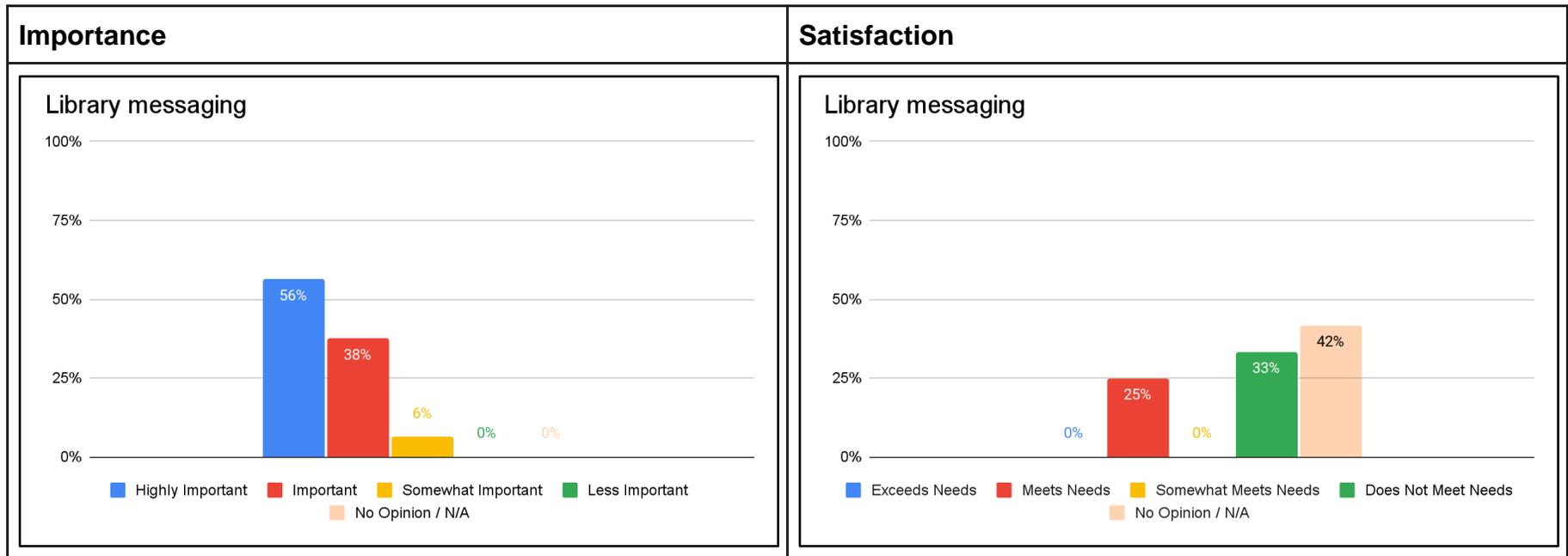


12.14.5. Online fine payment



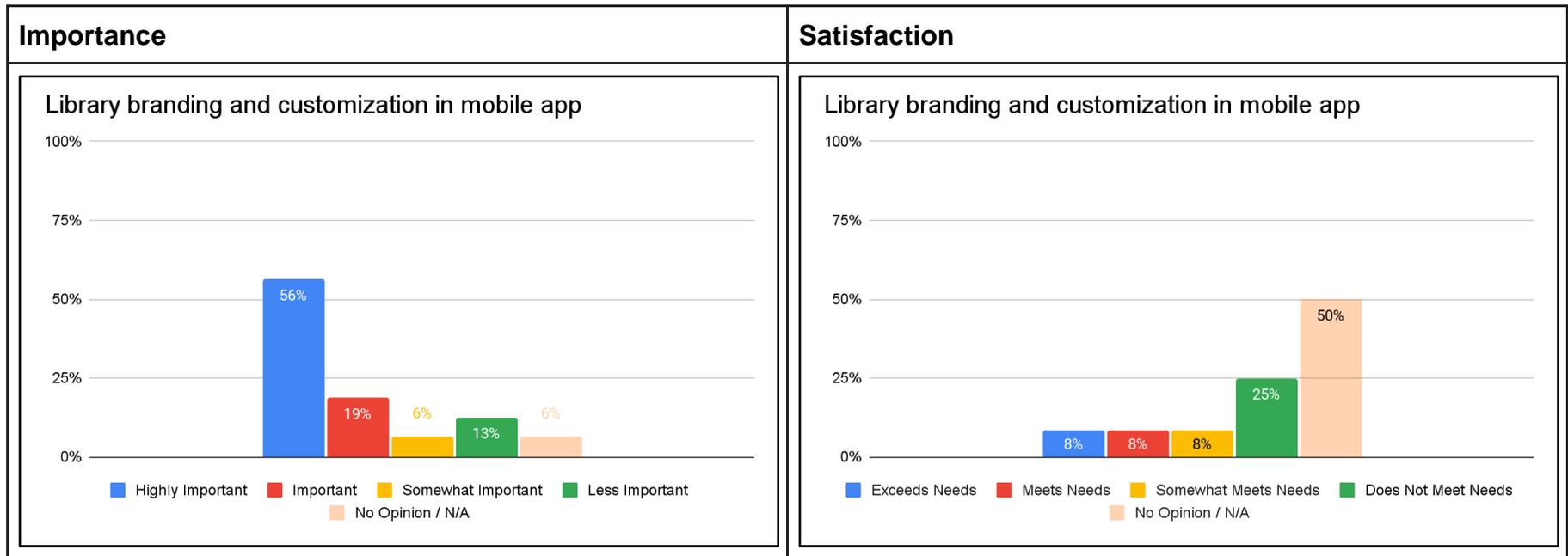


12.14.6. Library messaging



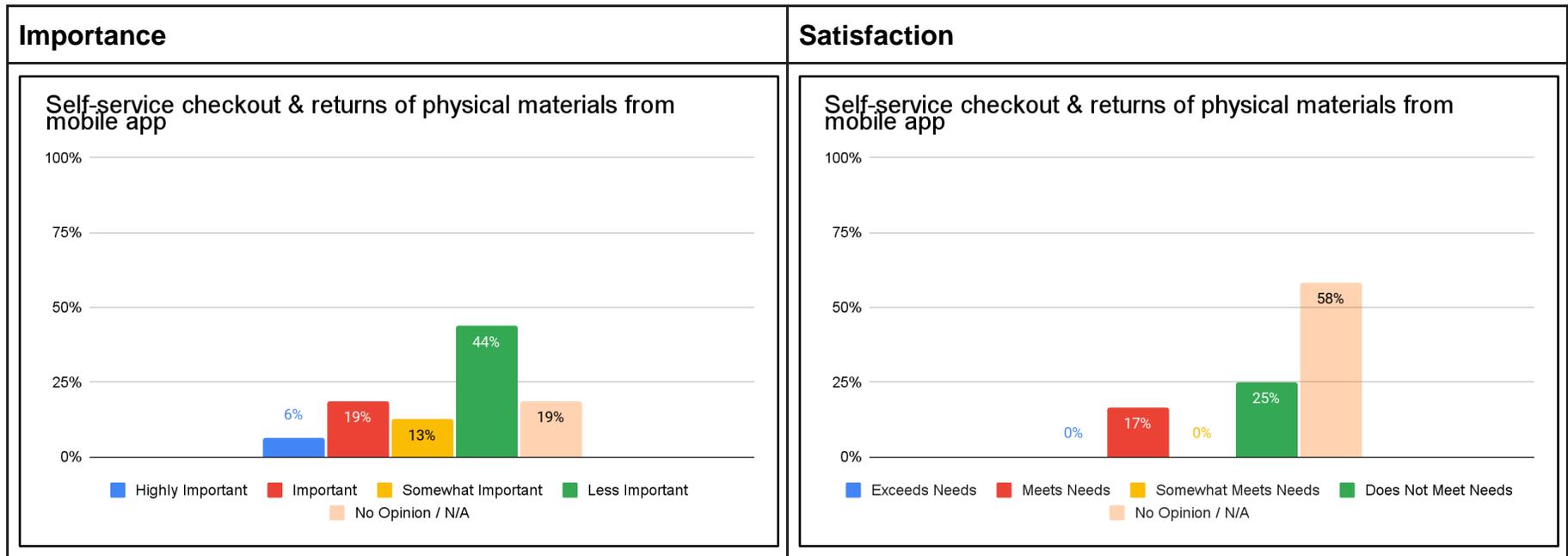


12.14.7. Library branding and customization in mobile app



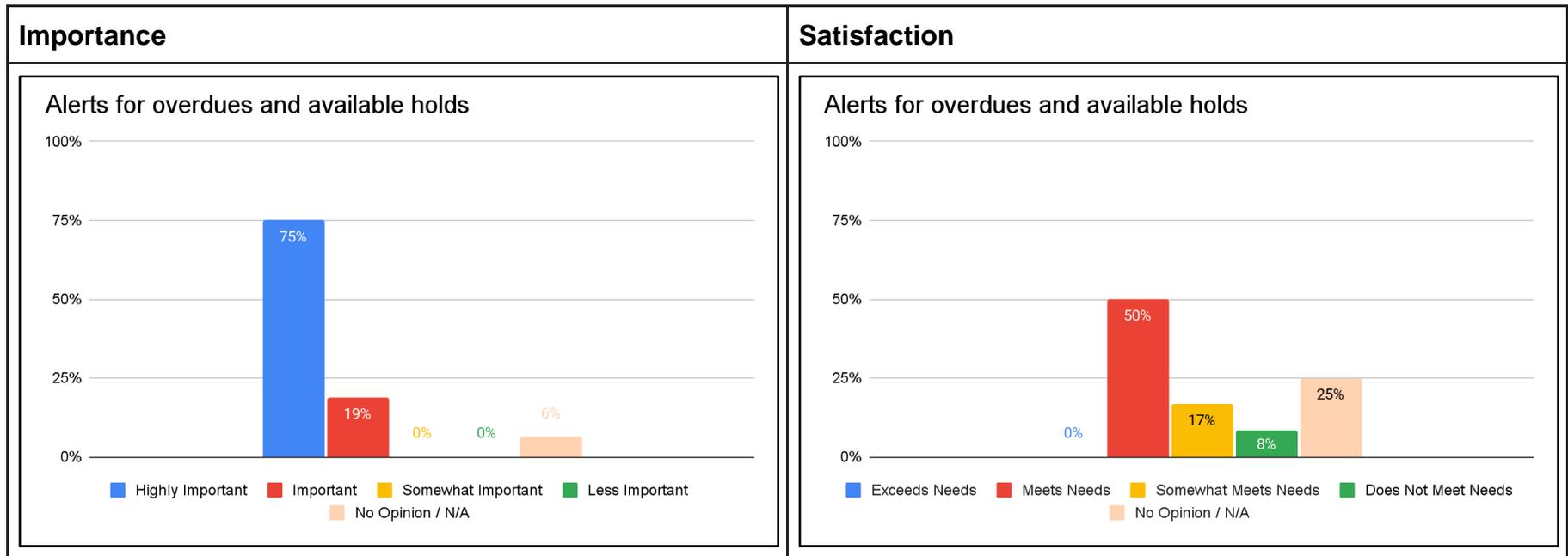


12.14.8. Self-service checkout & returns of physical materials from mobile app



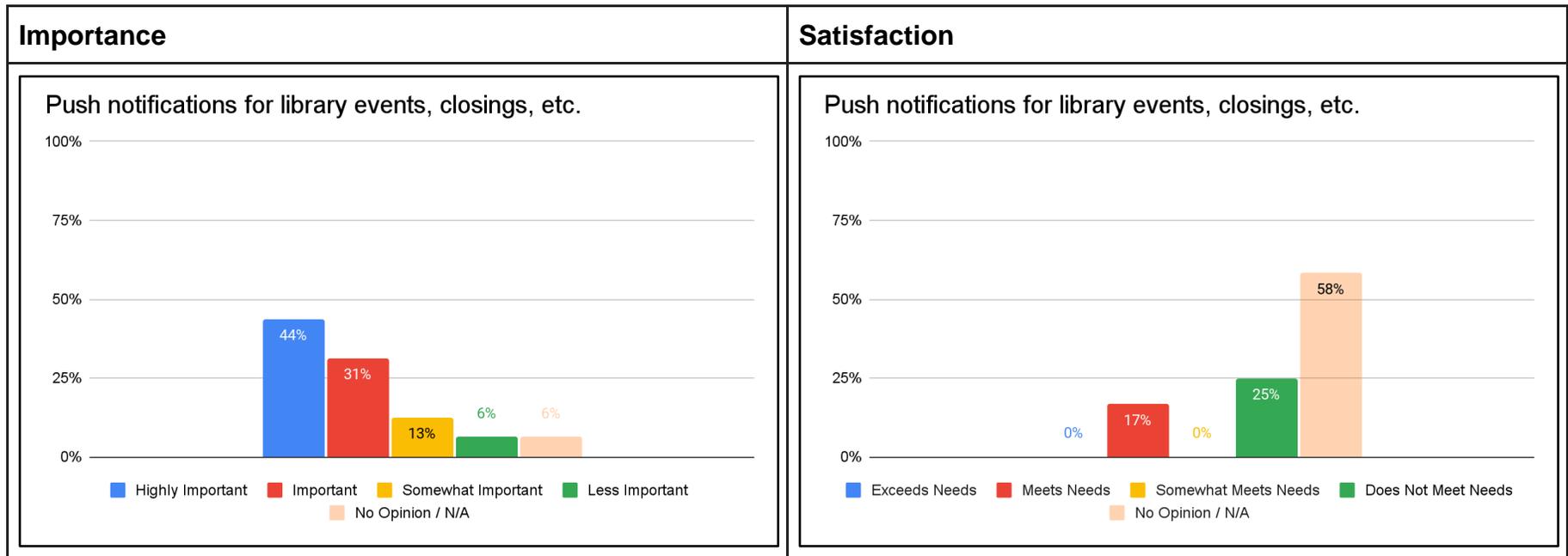


12.14.9. Alerts for overdues and available holds





12.14.10. Push notifications for library events, closings, etc.





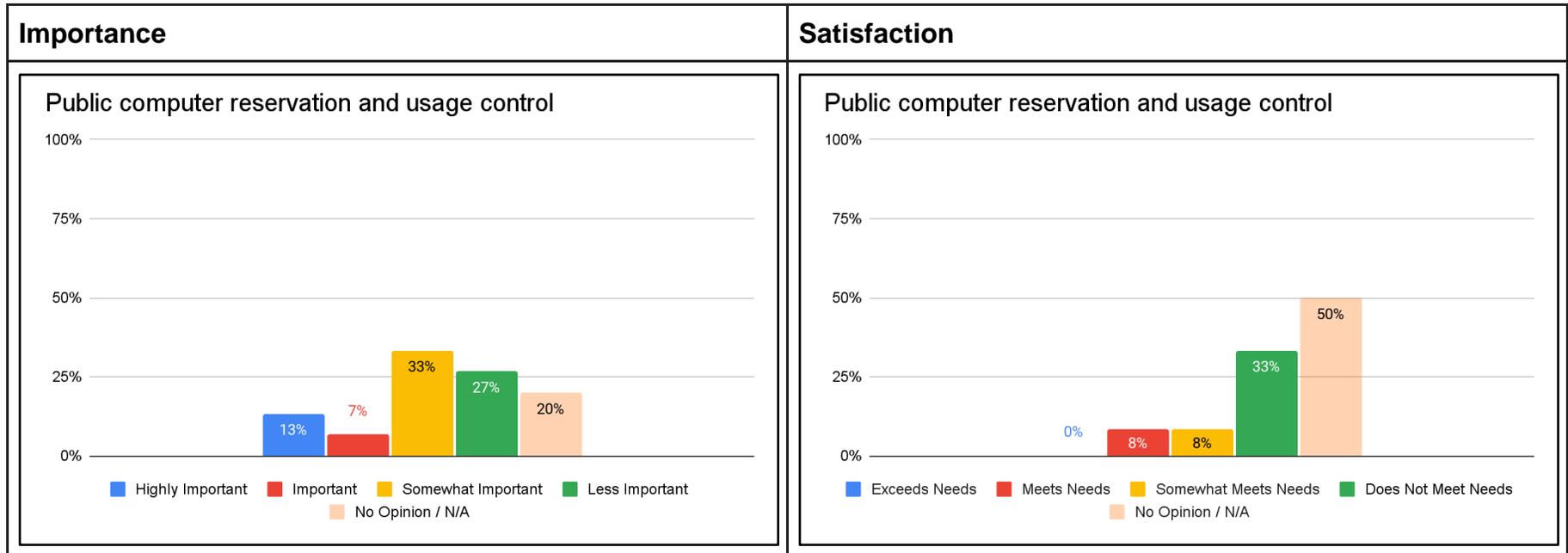
12.14.11. Mobile Interface for the Library Catalog, Self-Service, and Discovery Comments

| Importance | Satisfaction |
|--|---|
| <ul style="list-style-type: none"> • <i>The library where I currently work does not have a mobile app. A library system where I previously worked had one but it had numerous technical problems that frequently confused patrons. If an app was easy for patrons to understand and generally worked I could see it being useful but if not then I would suggest prioritizing other features.</i> • <i>We likely wouldn't use a separate app. However, I do want the public OPAC to be mobile compatible.</i> • <i>HOW DOES ONE USE SELF SERVICE TO RETURN A PHYSICAL ITEM?</i> | <ul style="list-style-type: none"> • <i>Don't have and it's not a priority.</i> • <i>Most not currently available</i> |



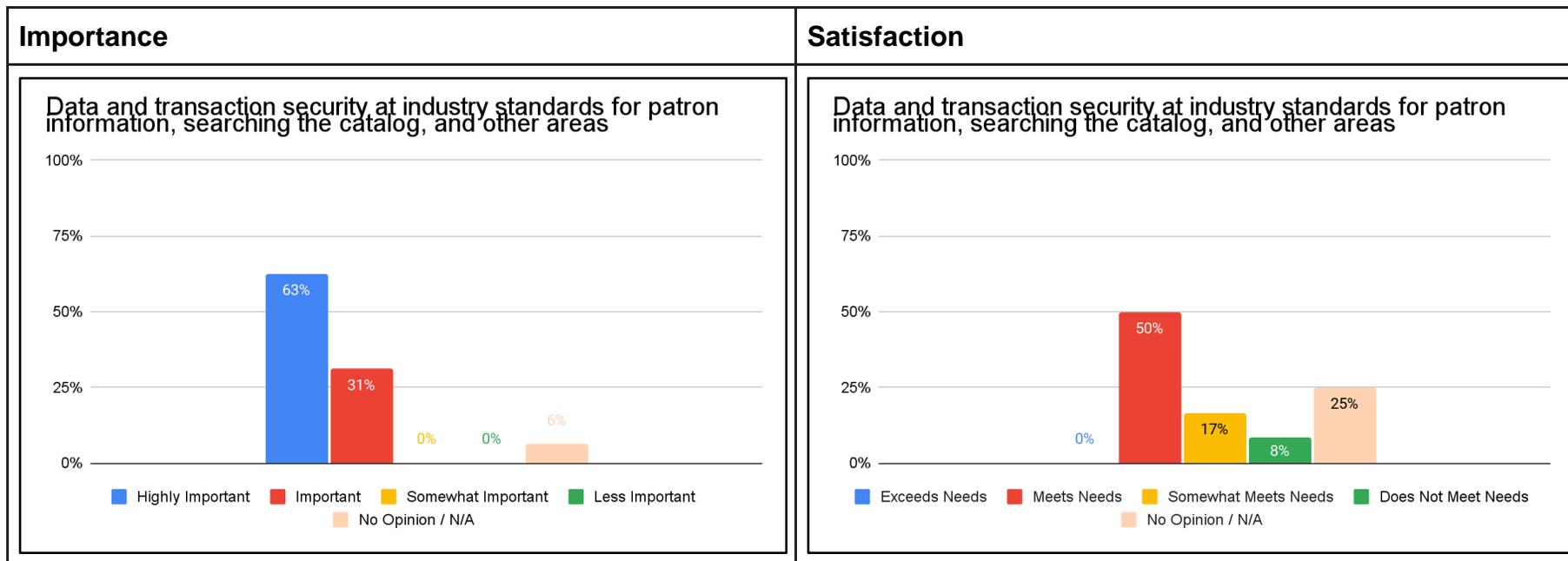
12.16. Other

12.16.1. Public computer reservation and usage control





12.16.2. Data and transaction security at industry standards for patron information, searching the catalog, and other areas





| 12.16.3. Other Comments | |
|---|---|
| Importance | Satisfaction |
| <ul style="list-style-type: none"><i>Patrons do not use our computers enough for reservations to be useful.</i> | <ul style="list-style-type: none"><i>We don't use a reservation system. I'm not sure how secure our data is for things like catalog searches.</i><i>PC reservation is a separate system.</i> |



12.16.4. Please list any features not mentioned above that you feel are important for staff functions.

- This is for the staff and patron side: I forgot during the focus group, but we'd really like an easy way to search for materials and limit results by language: bilingual, Spanish, etc. For Koha users, currently there is no facet in the "Refine your search" box. I can do it using the advanced search function, but most patrons don't use that, and it requires scrolling through a long list of languages. Using current facet options to refine the search, I can only find Spanish language items if they are in a "Spanish" location, and I can only view one location at a time.
- FUZZY LOGIC SEARCH
- This survey is very comprehensive. I can't think of any functions that haven't been included.

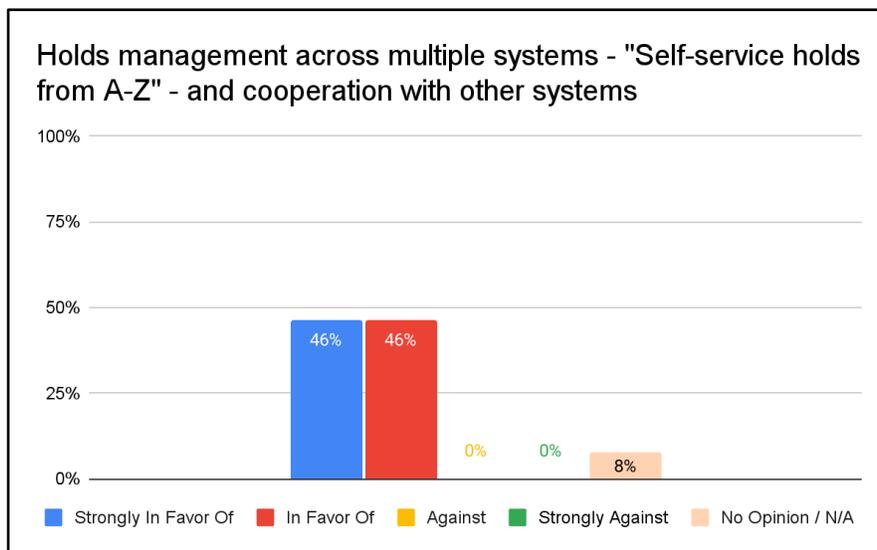
12.16.5. Please list any features not mentioned above that you feel are important for patrons.

- *1.) Use of zones when patrons place items on hold, which would prevent items being sent to distant locations when they are available locally. This would reduce the time it takes for items to reach patrons and also lower the cost of sending items between libraries. 2.) Ability to request specific copies when placing holds, so the patron receives the correct volume of a serial that are all on the same record, for example.*
- *I forgot during the focus group, but we'd really like an easy way to search for materials and limit results by language: bilingual, Spanish, etc. For Koha users, currently there is no facet in the "Refine your search" box. I can do it using the advanced search function, but most patrons don't use that, and it requires scrolling through a long list of languages. Using current facet options to refine the search, I can only find Spanish language items if they are in a "Spanish" location, and I can only view one location at a time. While it might be nice to have multi language support for the whole OPAC, just having decent search mechanisms would be great.*
- *Purchase suggestions, patron messages to specific libraries.*

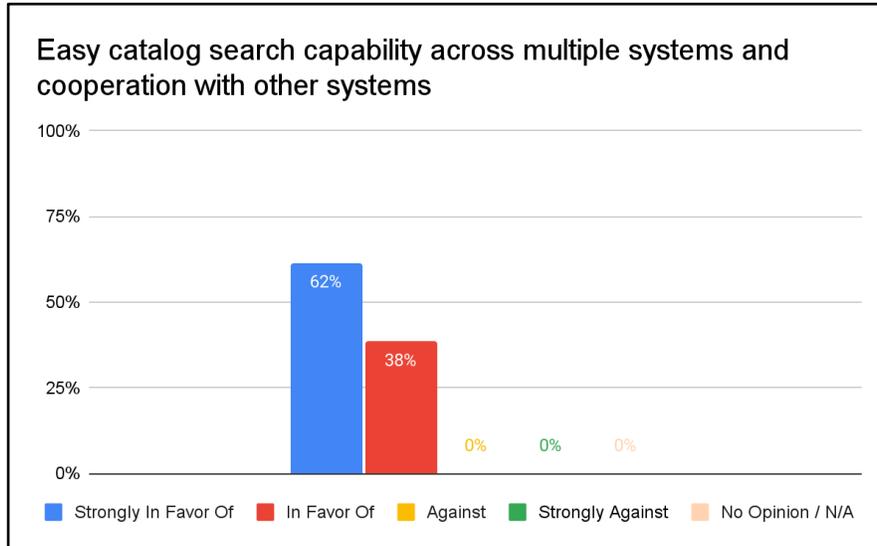
13. Detail: ILS Needs and Wants

13.1. Needs and wants arising from the question, "What ILS functions or features are the most important to you from a Patron perspective?"

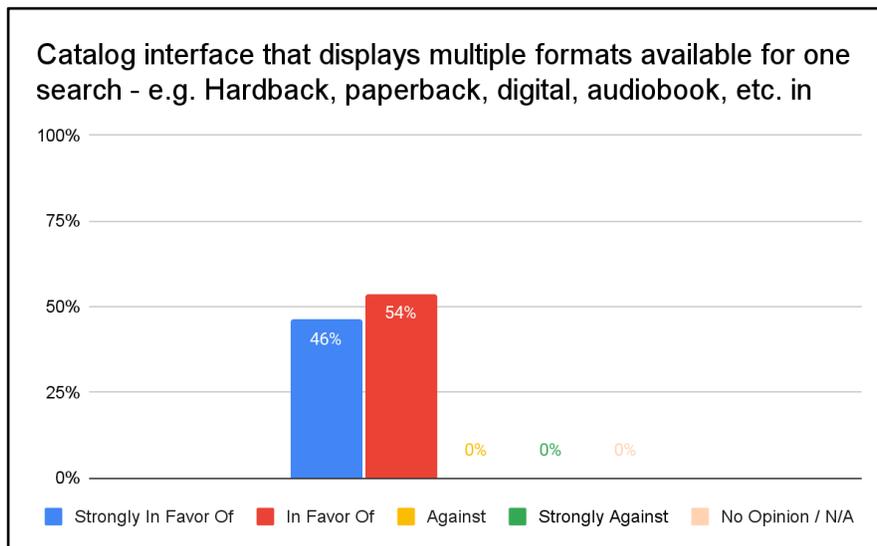
13.1.1. Holds management across multiple systems - "Self-service holds from A-Z" - and cooperation with other systems



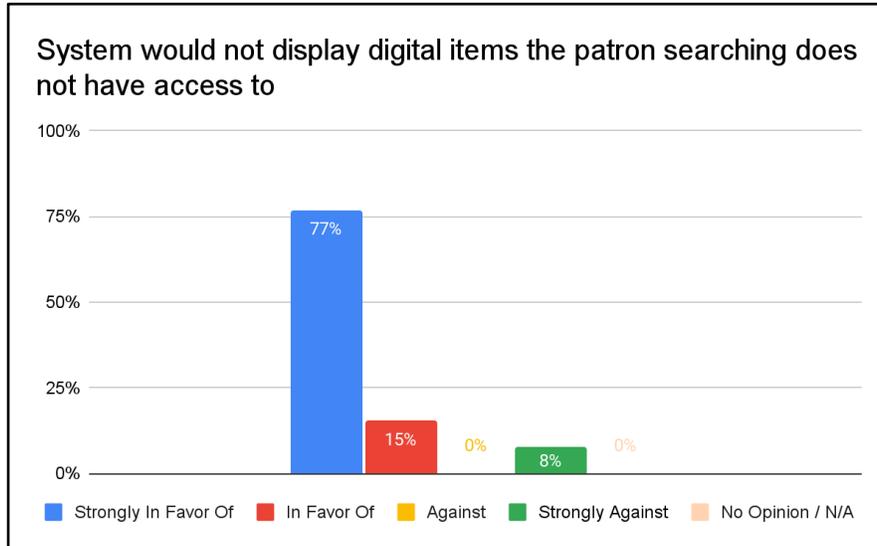
13.1.2. Easy catalog search capability across multiple systems and cooperation with other systems



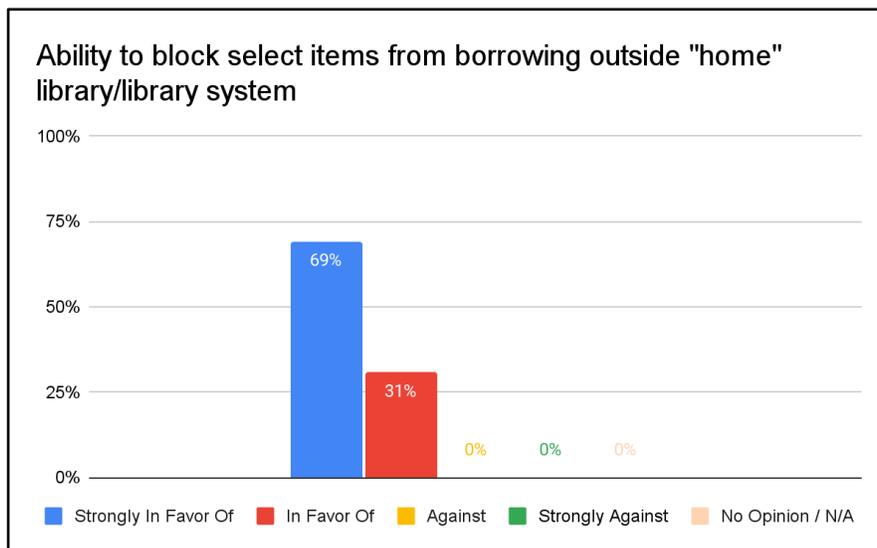
13.1.3. Catalog interface that displays multiple formats available for one search - e.g., Hardback, paperback, digital, audiobook, etc. in one record



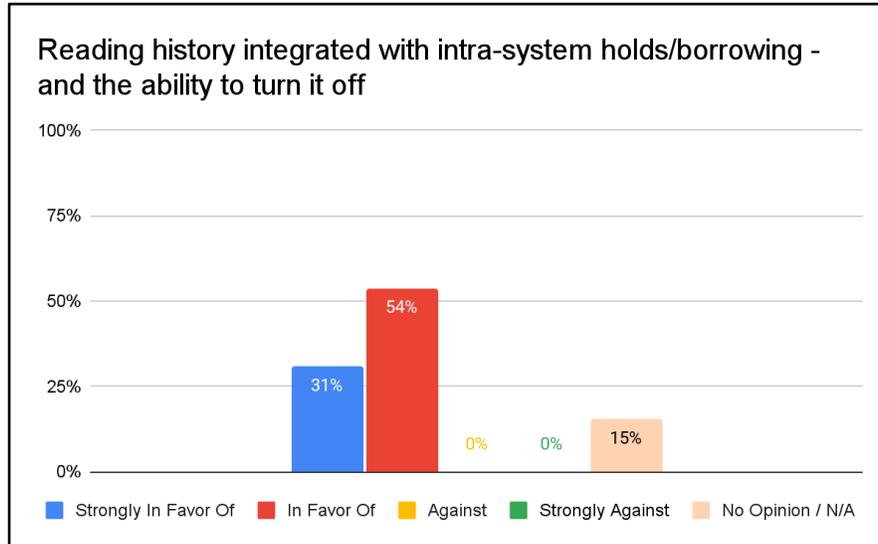
13.1.4. System would not display digital items the patron searching does not have access to



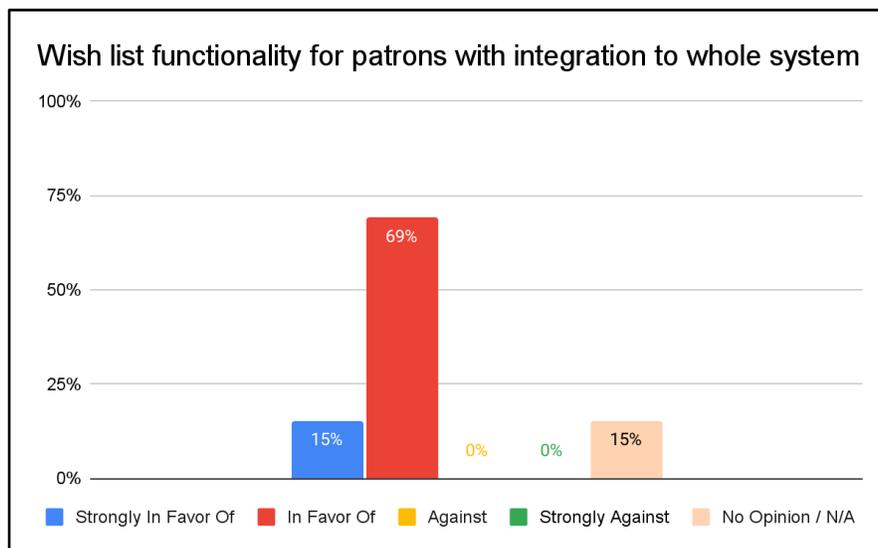
13.1.5. Ability to block select items from borrowing outside "home" library/library system



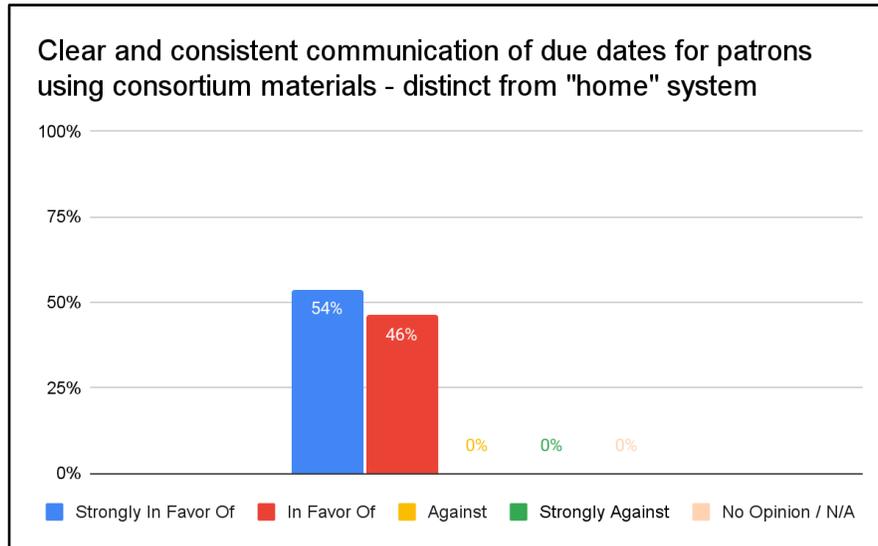
13.1.6. Reading history integrated with intra-system holds/borrowing - and the ability to turn it off



13.1.7. Wish list functionality for patrons with integration to whole system



13.1.8. Clear and consistent communication of due dates for patrons using consortium materials - distinct from "home" system communication

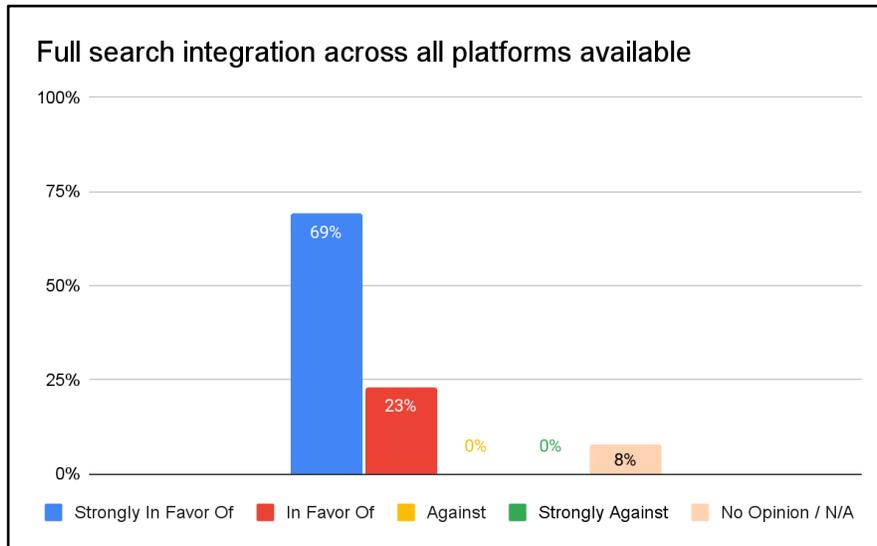


13.1.9. ILS Functions and Features from Patron Perspective Comments

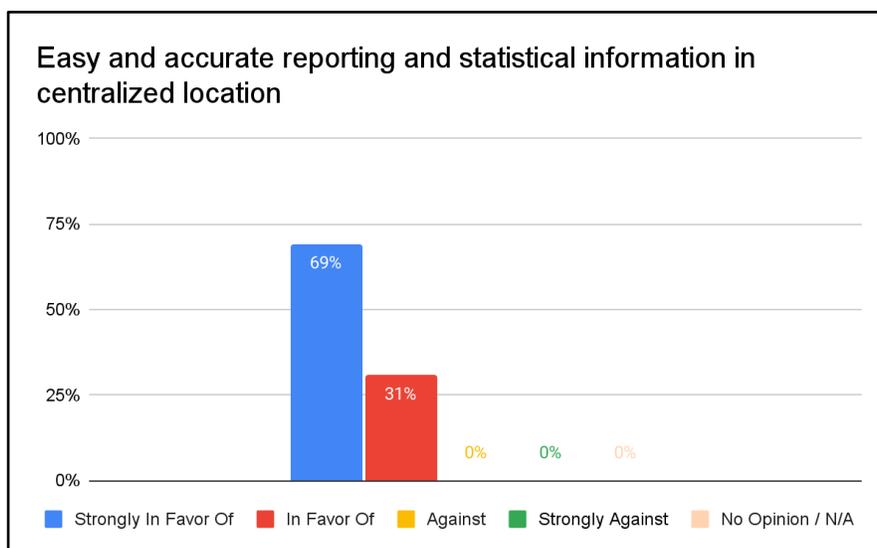
- *n/a*

13.2. Needs and wants arising from the question, "What ILS functions or features are the most important to you from a Staff perspective?"

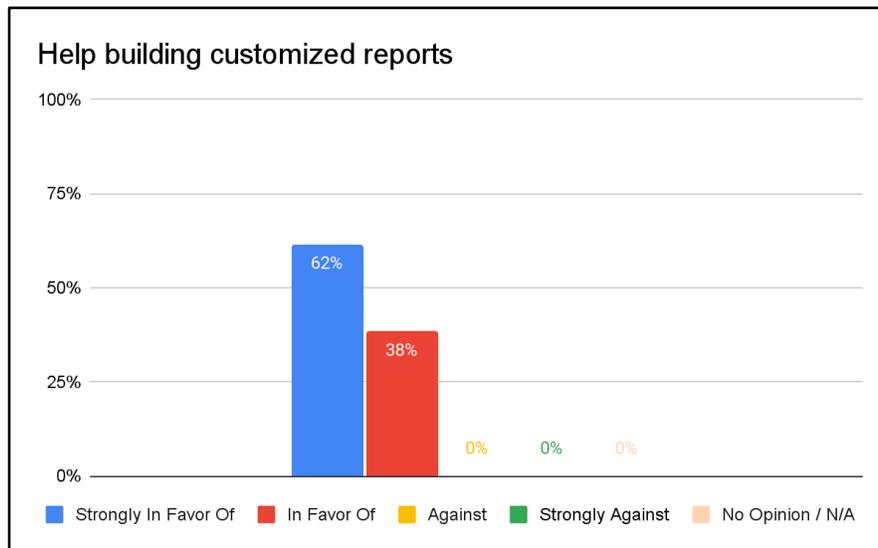
13.2.1. Full search integration across all platforms available



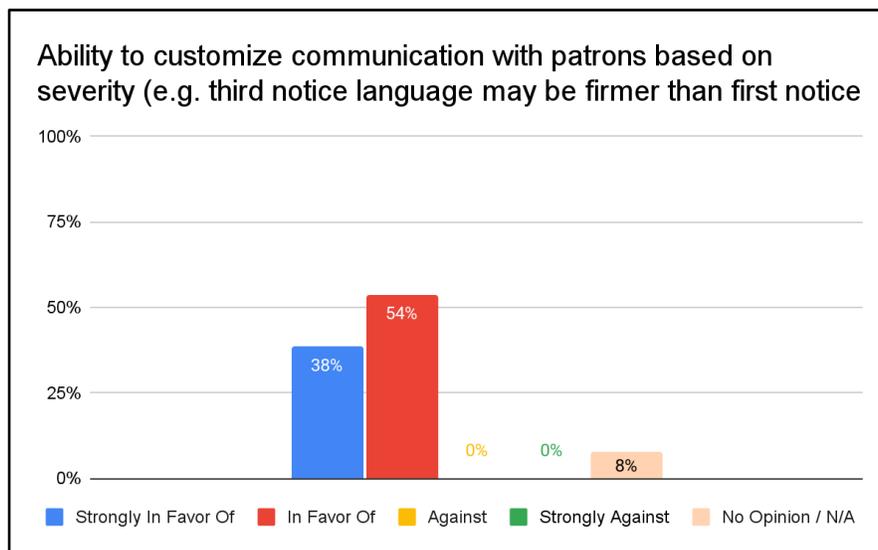
13.2.2. Easy and accurate reporting and statistical information in centralized location



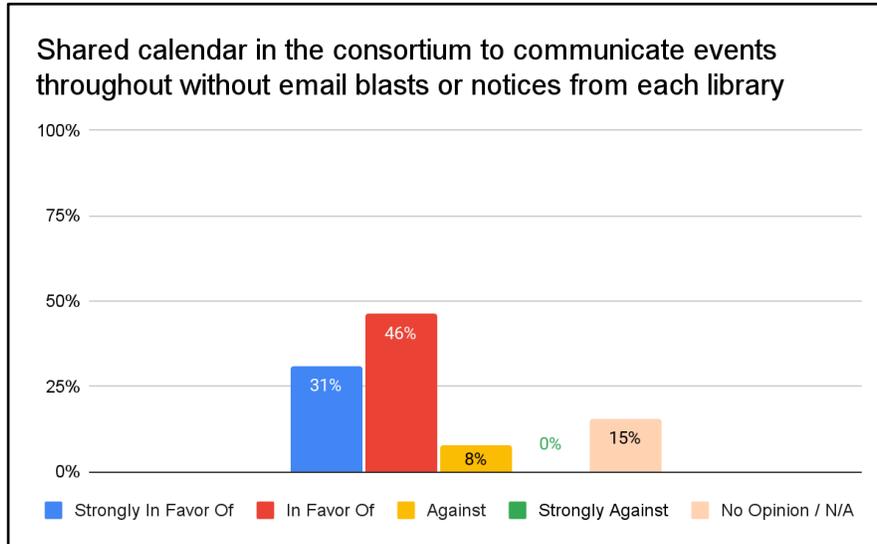
13.2.3. Help building customized reports



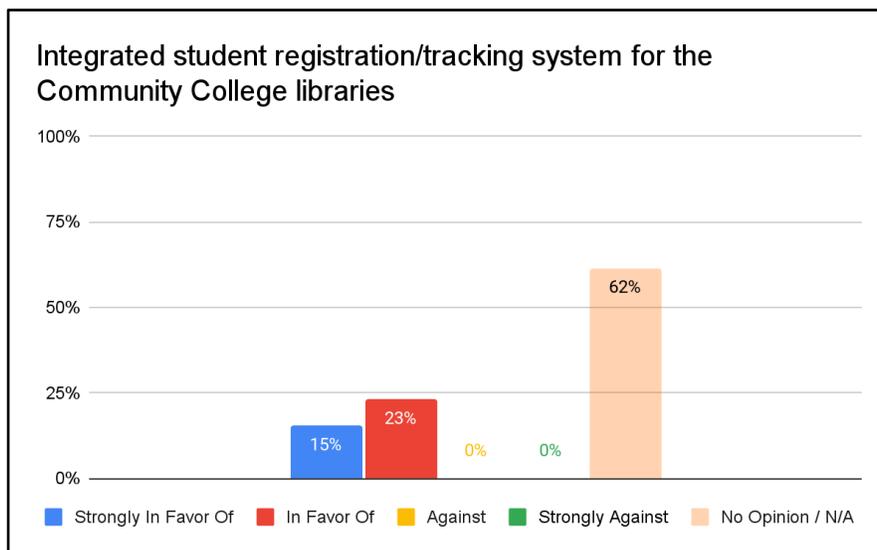
13.2.4. Ability to customize communication with patrons based on severity (e.g., third notice language may be firmer than first notice language)



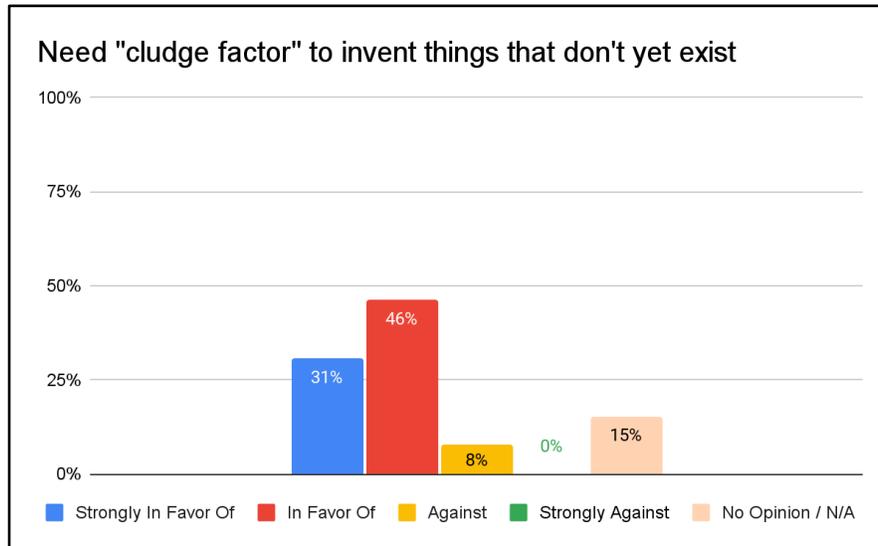
13.2.5. Shared calendar in the consortium to communicate events throughout without email blasts or notices from each library



13.2.6. Integrated student registration/tracking system for the Community College libraries



13.2.7. Need "kludge factor" to invent things that don't yet exist

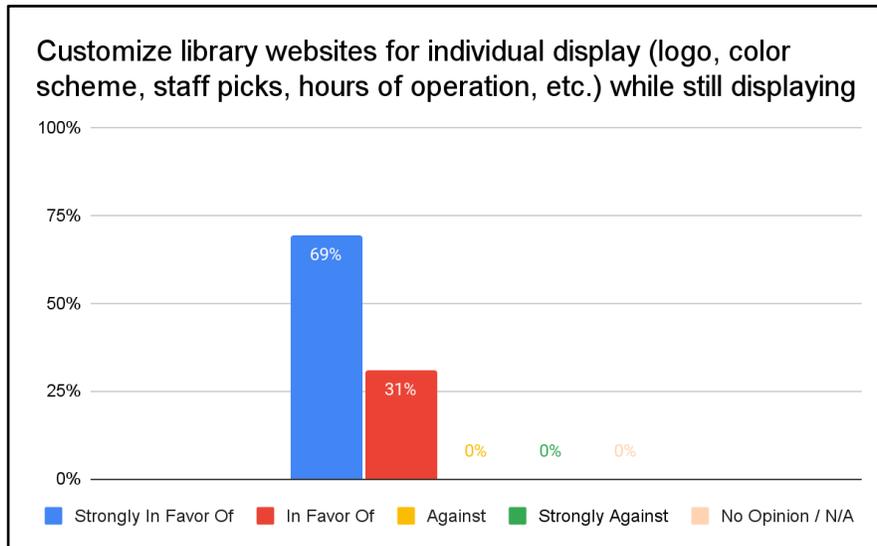


13.2.8. ILS Functions and Features from Staff Perspective Comments

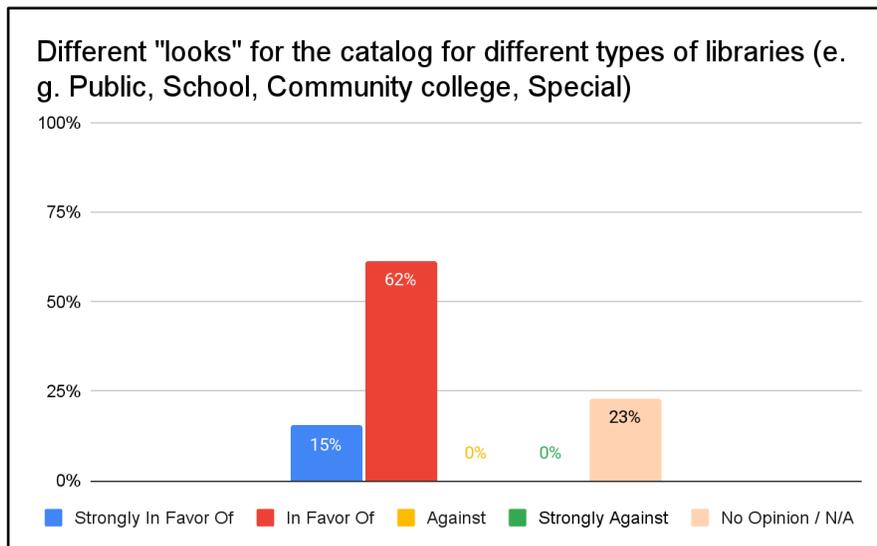
- *I wasn't sure what a "kludge factor" was. Is it supposed to be Kludge?*
- *Notices need to look like invoices not letters.*
- *I'd prefer not to have to have a "kludge factor"!*

13.3. Needs and wants arising from the question, "What would you like to see in terms of "Discovery"?"

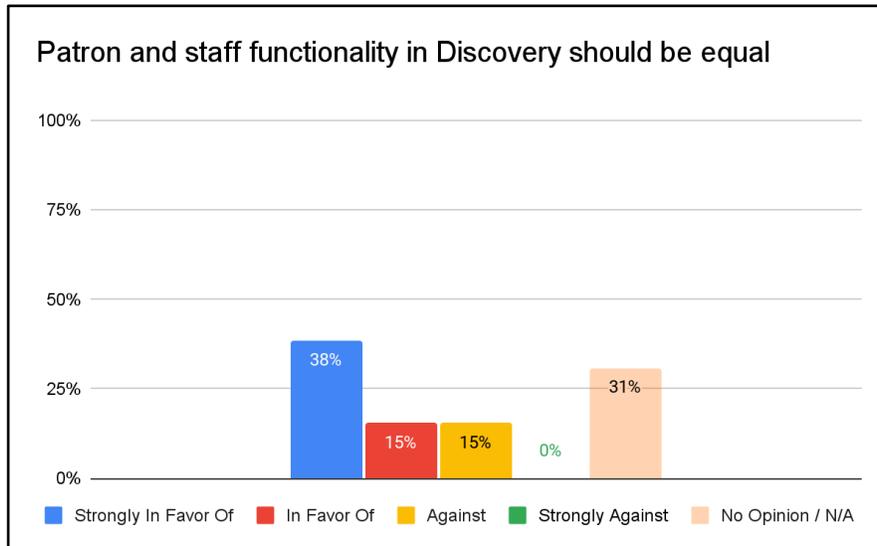
13.3.1. Customize library websites for individual display (logo, color scheme, staff picks, hours of operation, etc.) while still displaying the consortium search when needed



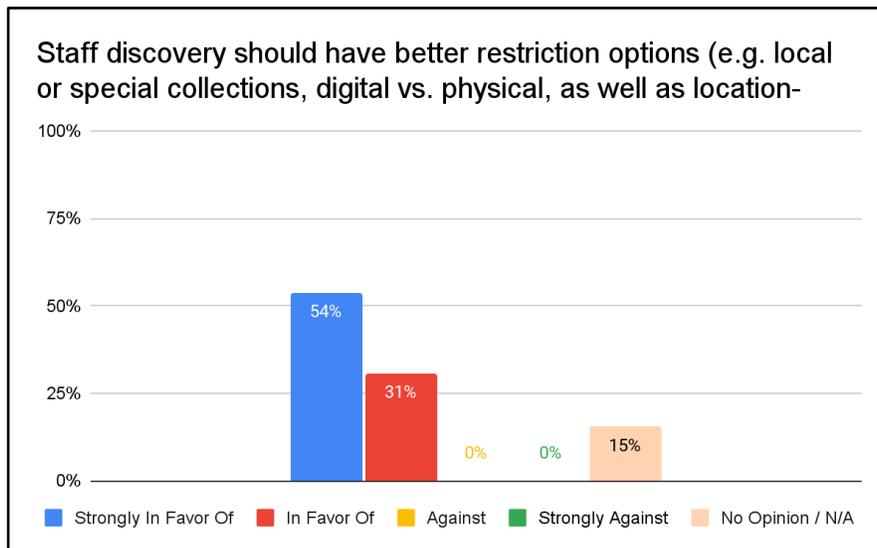
13.3.2. Different "looks" for the catalog for different types of libraries (e.g., Public, School, Community college, Special)



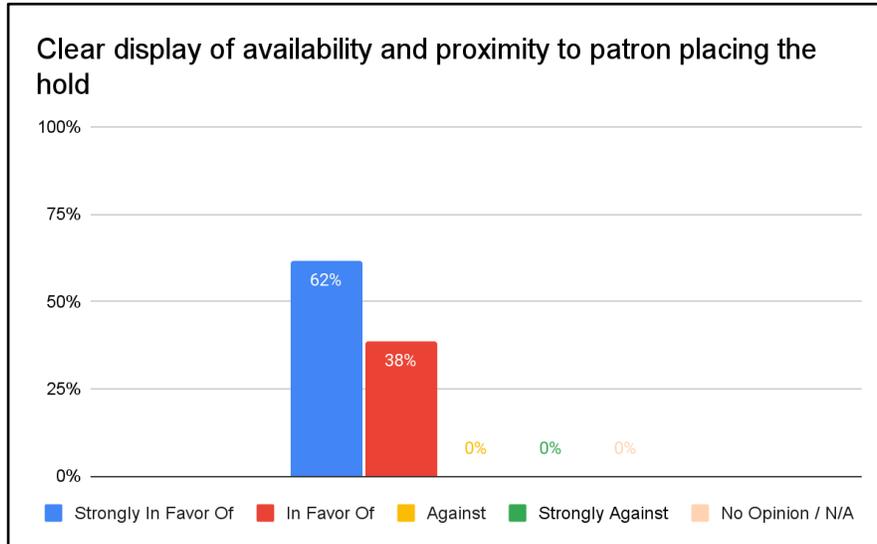
13.3.3. Patron and staff functionality in Discovery should be equal



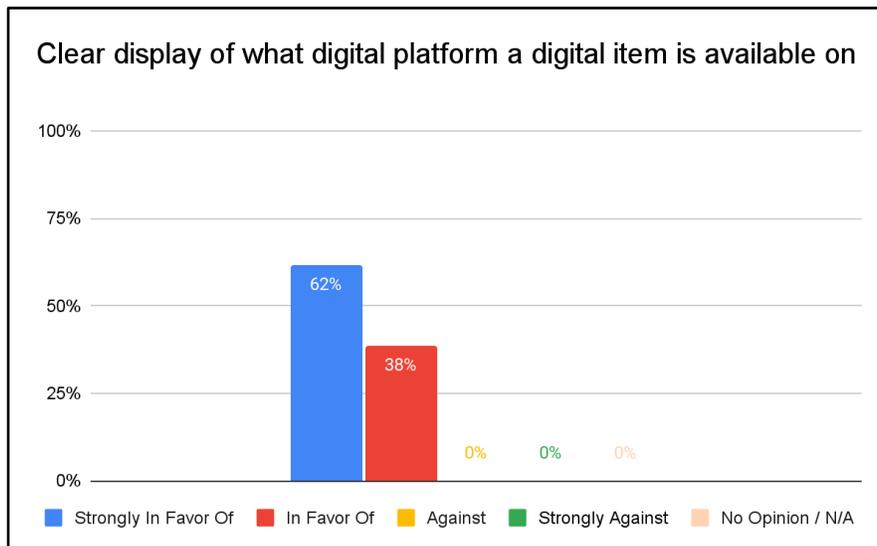
13.3.4. Staff discovery should have better restriction options (e.g., local or special collections, digital vs. physical, as well as location-based)



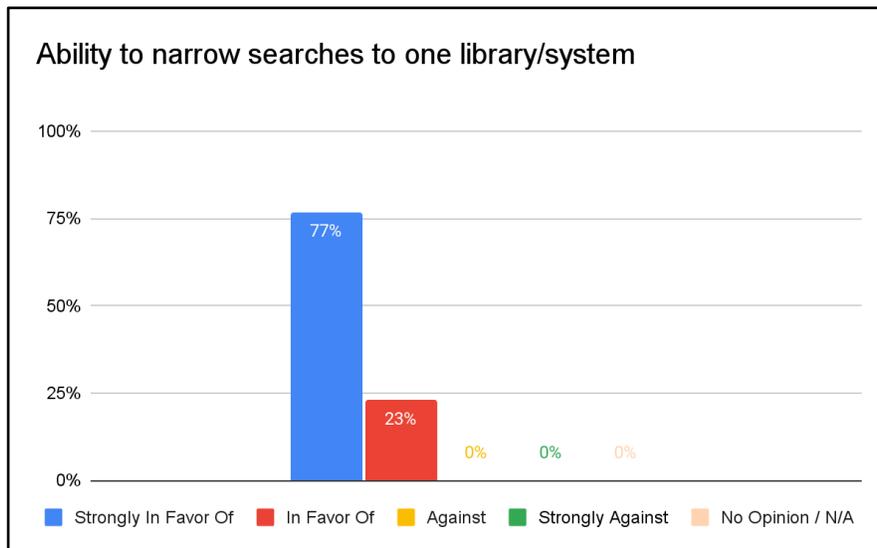
13.3.5. Clear display of availability and proximity to patron placing the hold



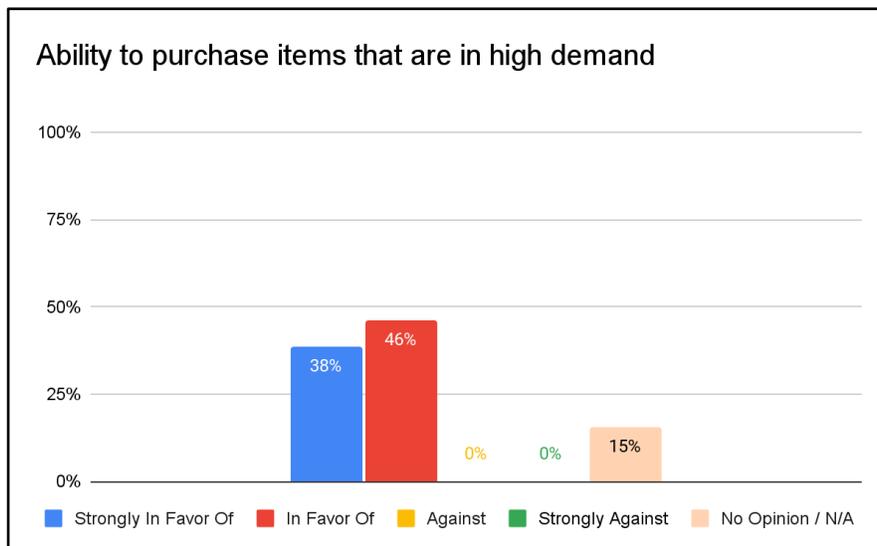
13.3.6. Clear display of what digital platform a digital item is available on



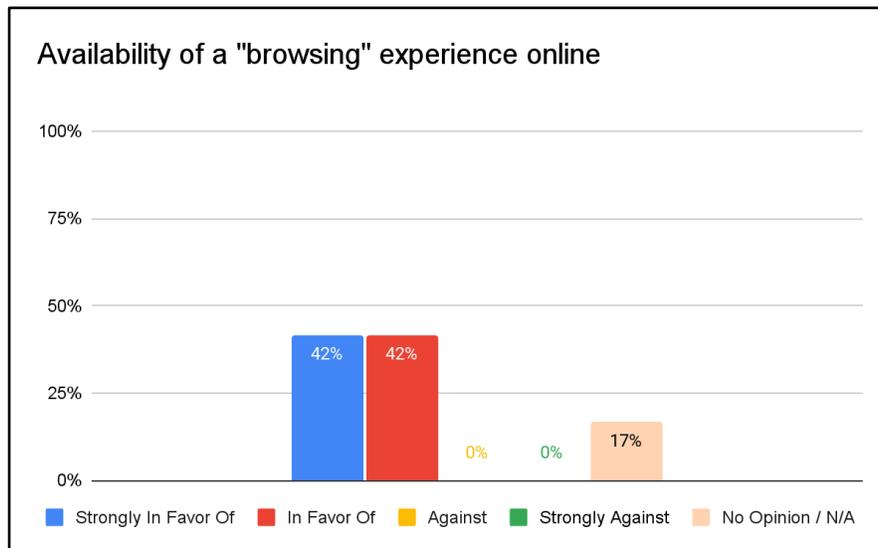
13.3.7. Ability to narrow searches to one library/system



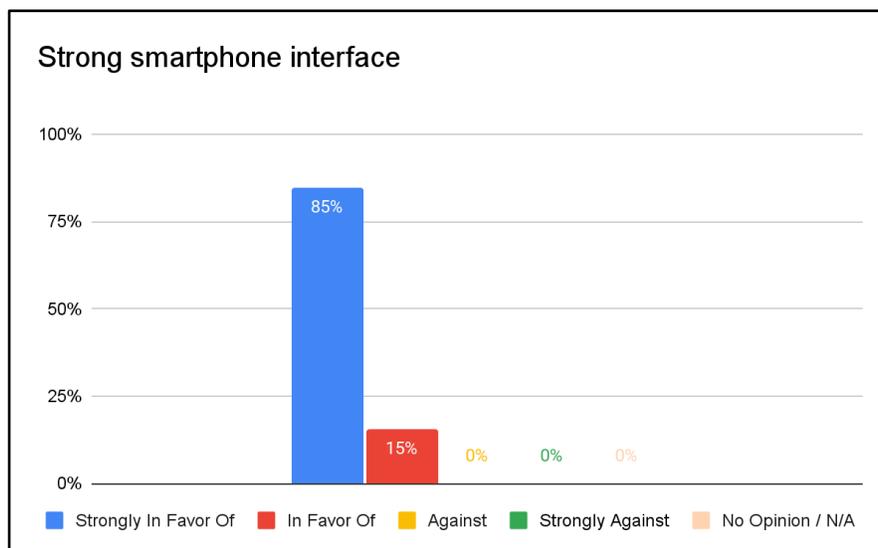
13.3.8. Ability to purchase items that are in high demand



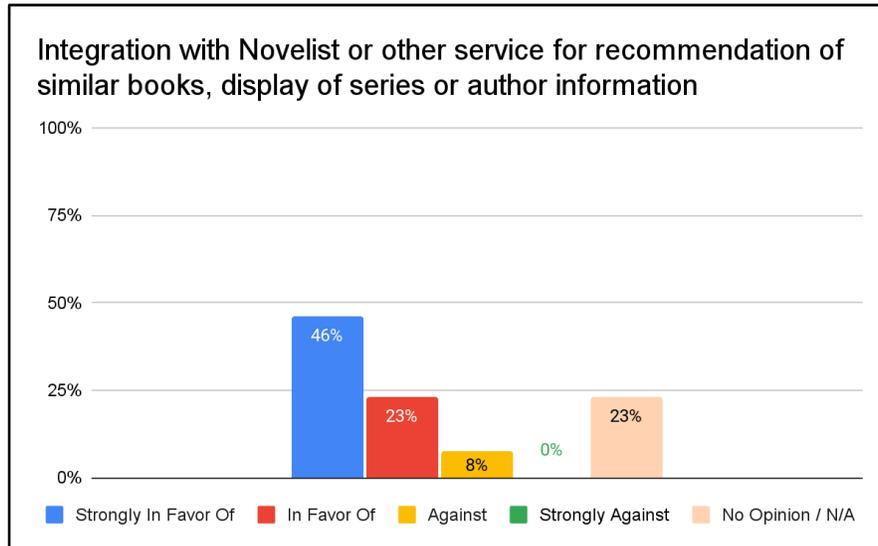
13.3.9. Availability of a "browsing" experience online



13.3.10. Strong smartphone interface



13.3.11. Integration with Novelist or other service for recommendation of similar books, display of series or author information

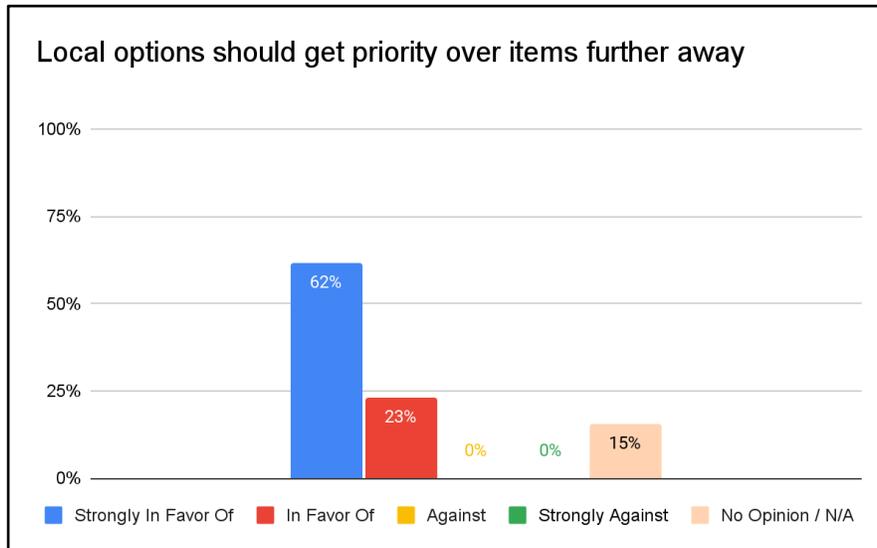


13.3.12. Discovery Needs and Wants Comments

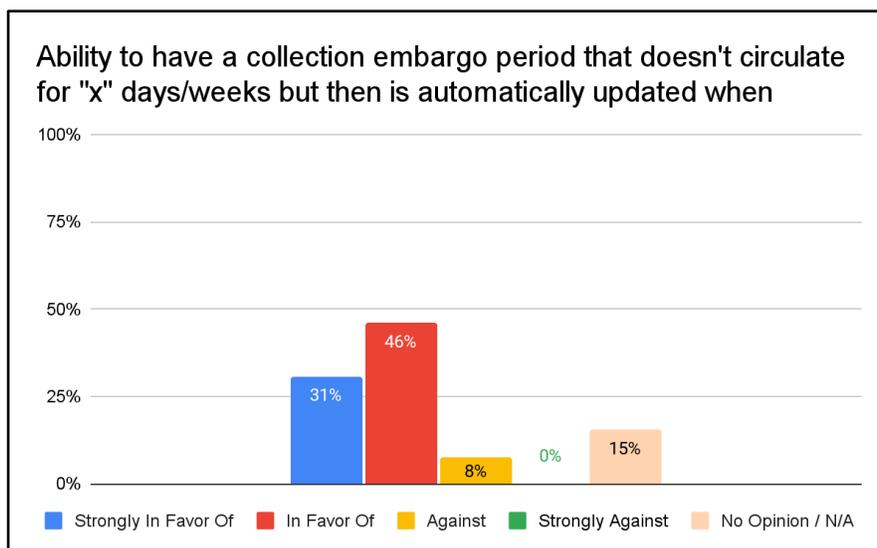
- *I'd like to be able to customize the website some, but I don't think it needs to be different for college and public libraries.*

13.4. Resource sharing needs and wants arising from the question, "What collection sharing model should a possible consortium consider? How can the ILS Support the model?"

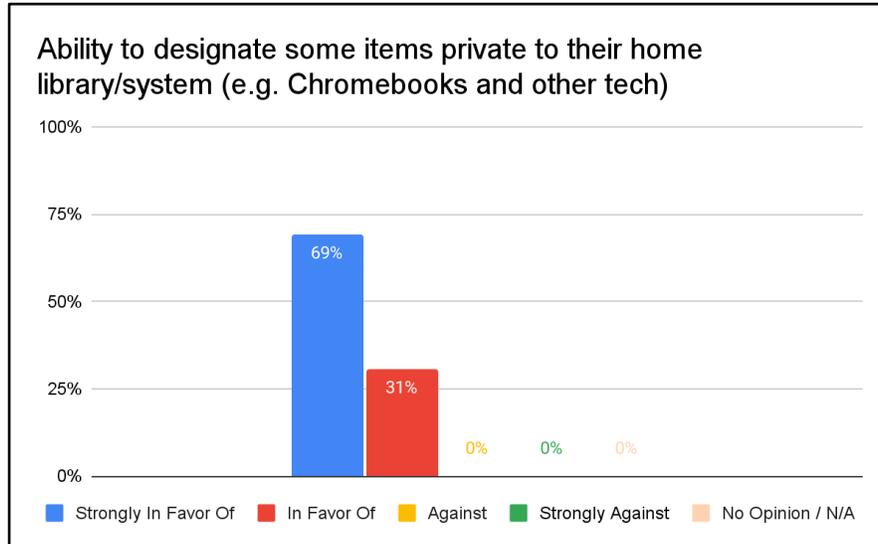
13.4.1. Local options should get priority over items further away



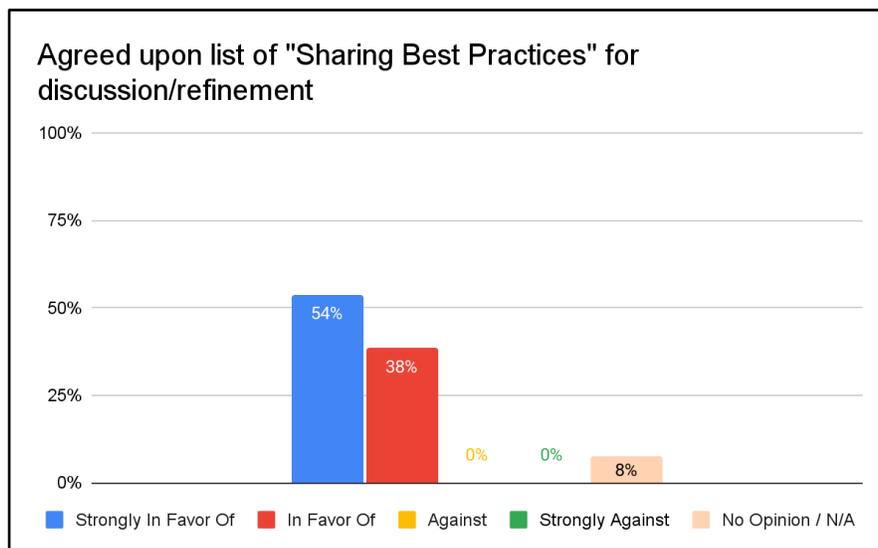
13.4.2. Ability to have a collection embargo period that doesn't circulate for "x" days/weeks but then is automatically updated when embargo period is finished



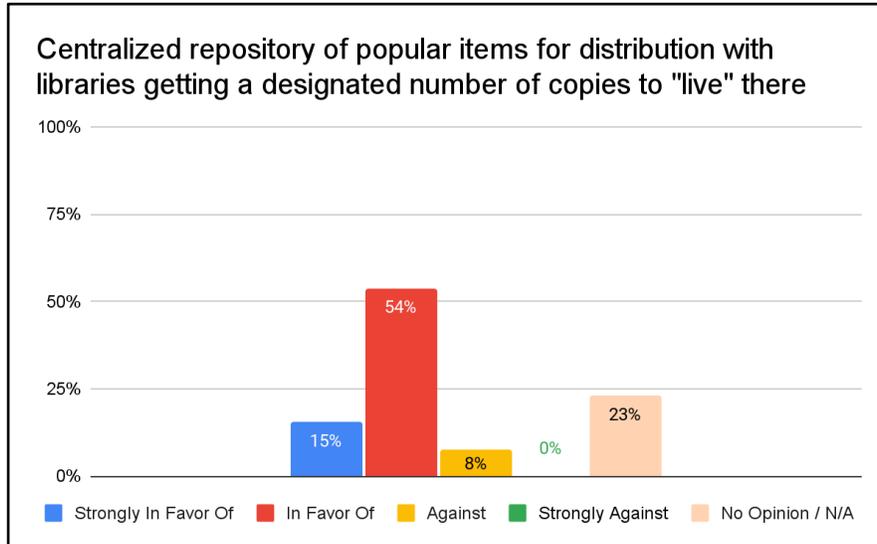
13.4.3. Ability to designate some items private to their home library/system (e.g., Chromebooks and other tech)



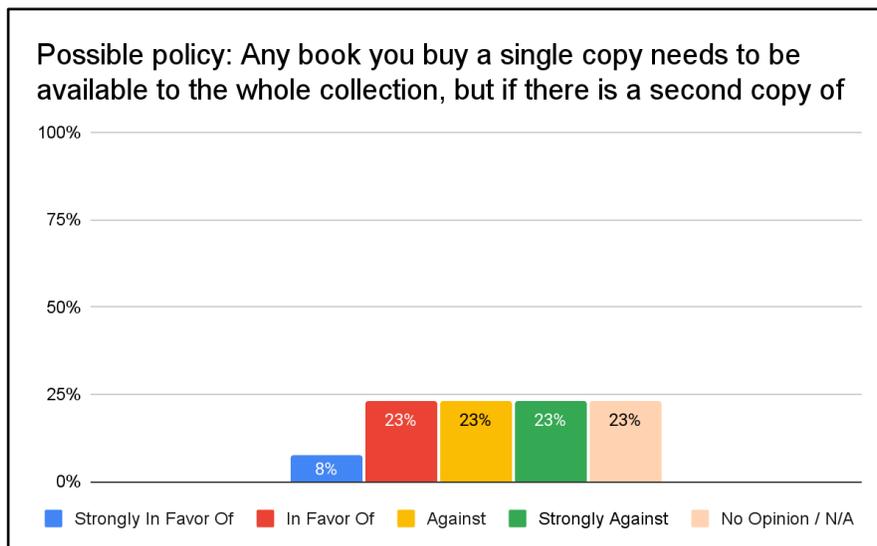
13.4.4. Agreed upon list of "Sharing Best Practices" for discussion/refinement



13.4.5. Centralized repository of popular items for distribution with libraries getting a designated number of copies to "live" there



13.4.6. Possible policy: Any book you buy a single copy needs to be available to the whole collection, but if there is a second copy of it that should be able to be local-only



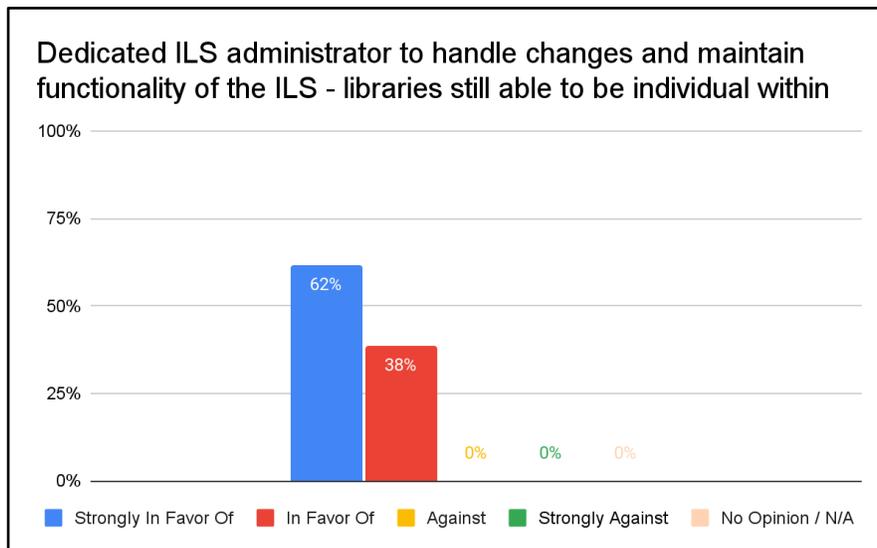
August 2022

13.4.8. Resource Sharing Needs and Wants Comments

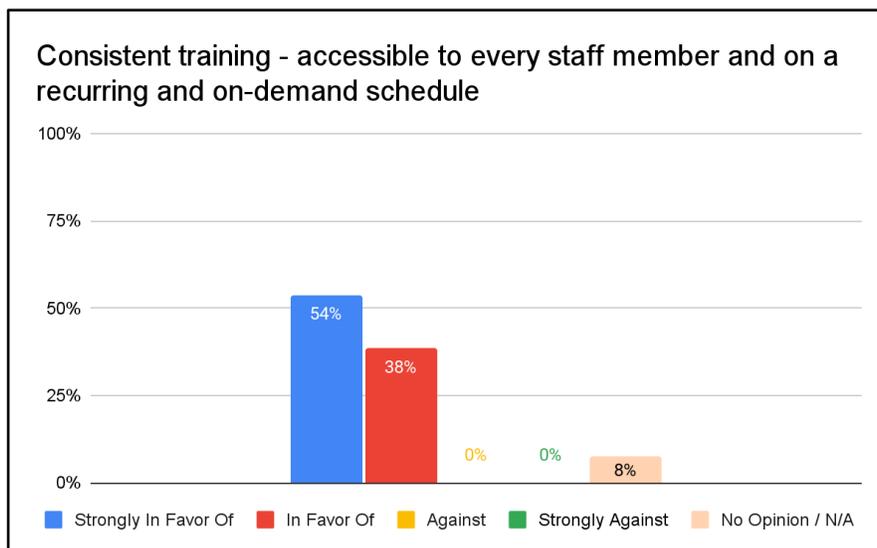
- *I am against the policy of requiring single copy items to be available everywhere because we have a local policy that we are (with very rare exceptions) only supposed to have one copy of each book so the single copy borrowing policy would automatically apply to almost everything. Titles that we only want to circulate here would be automatically sent elsewhere simply because we do not have the money or the space to buy more than one.*
- *The last one works for the majority of our books, but some books we buy as course reserves and they need to be local-only.*

13.5. Needs and wants arising from the question, "What services should a possible new consortium provide?"

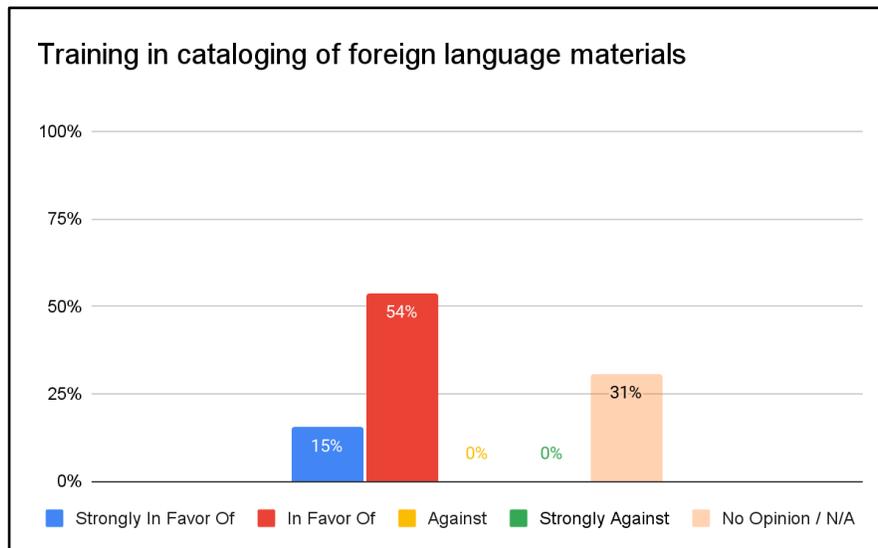
13.5.1. Dedicated ILS administrator to handle changes and maintain functionality of the ILS - libraries still able to be individual within the system



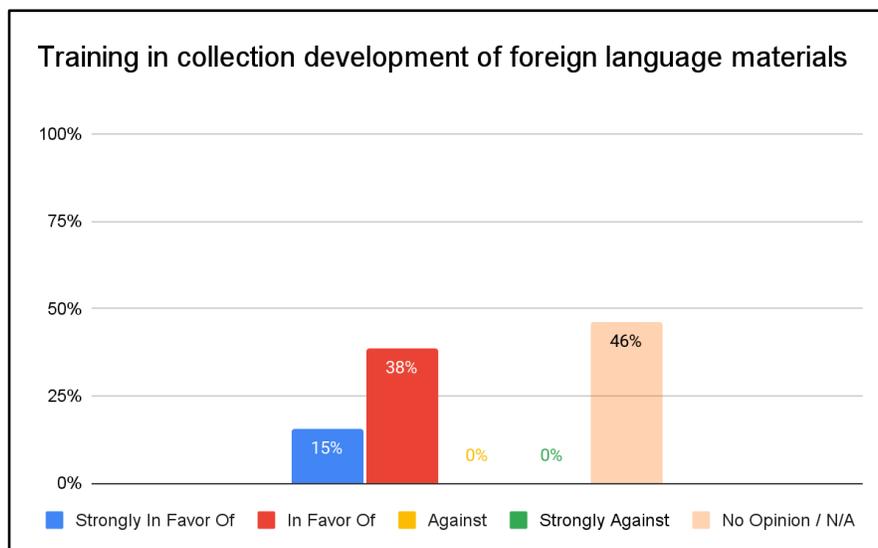
13.5.2. Consistent training - accessible to every staff member and on a recurring and on-demand schedule



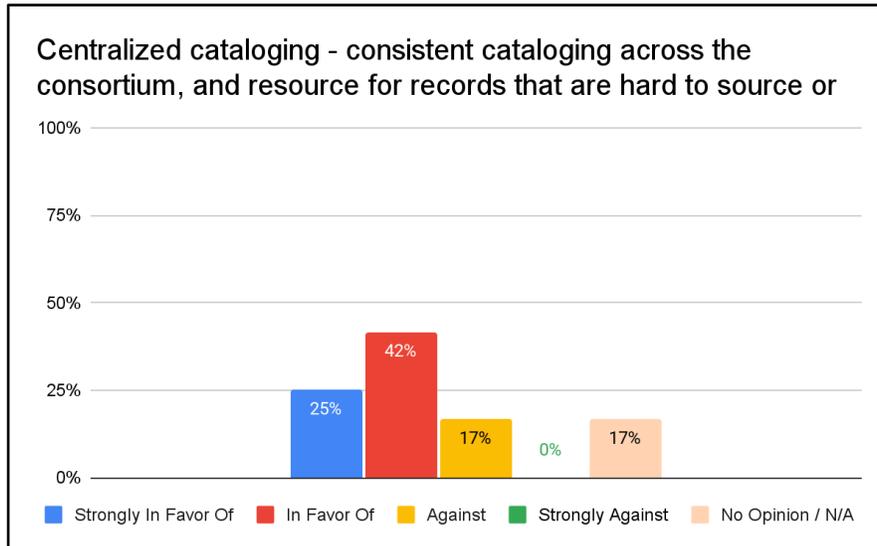
13.5.3. Training in cataloging of foreign language materials



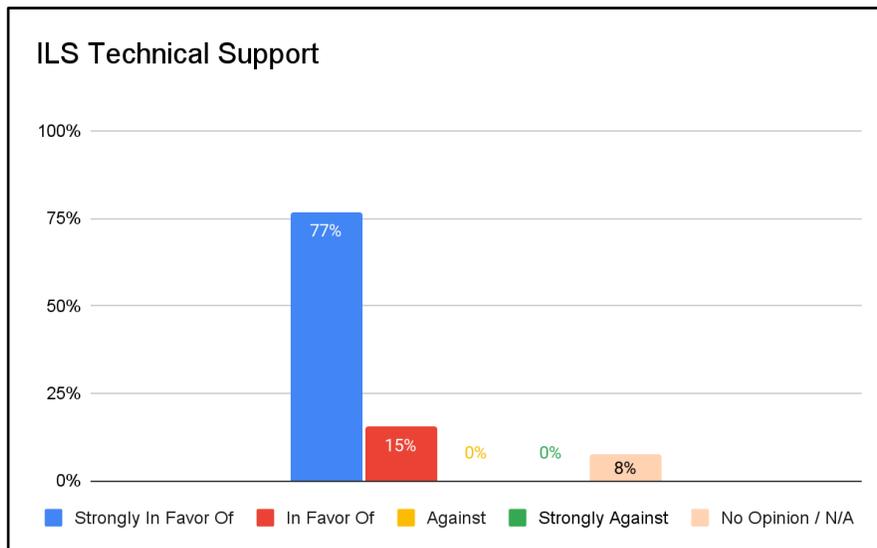
13.5.4. Training in collection development of foreign language materials



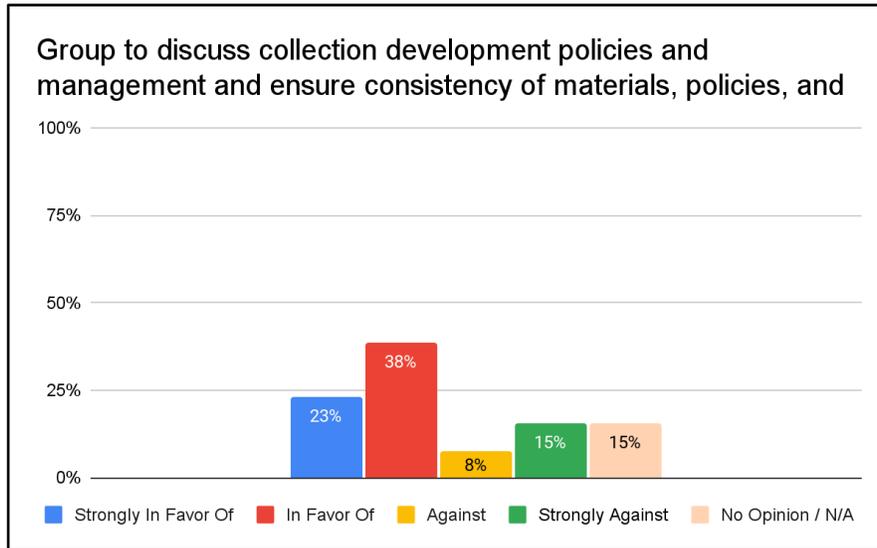
13.5.5. Centralized cataloging - consistent cataloging across the consortium, and resource for records that are hard to source or unstandardized



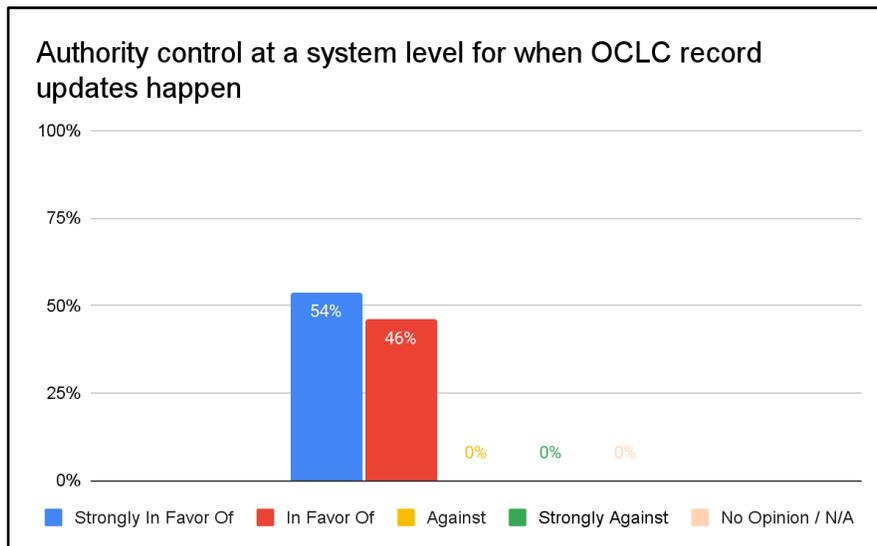
13.5.6. ILS Technical Support



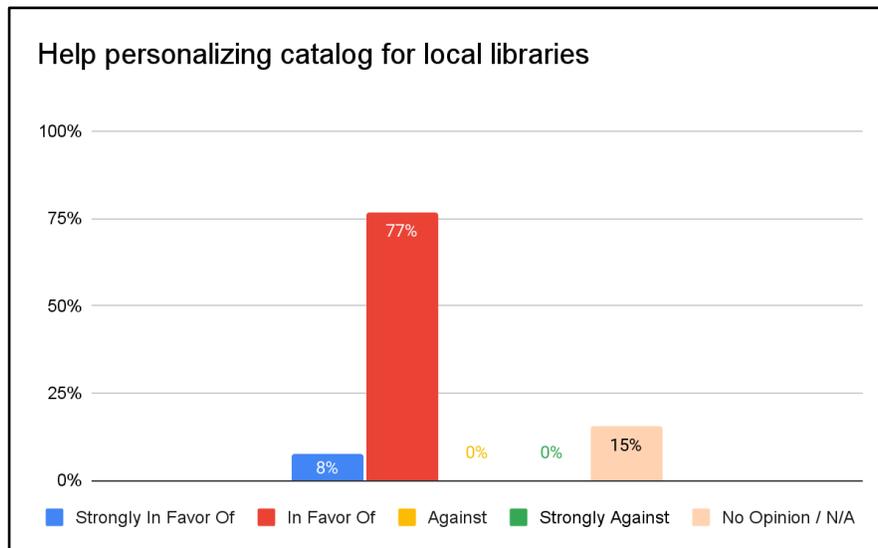
13.5.7. Group to discuss collection development policies and management and ensure consistency of materials, policies, and procedures



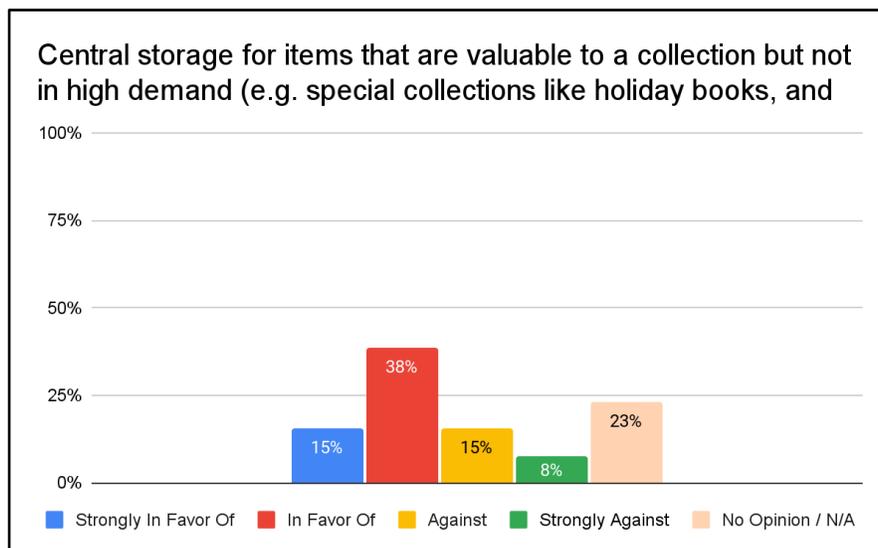
13.5.8. Authority control at a system level for when OCLC record updates happen



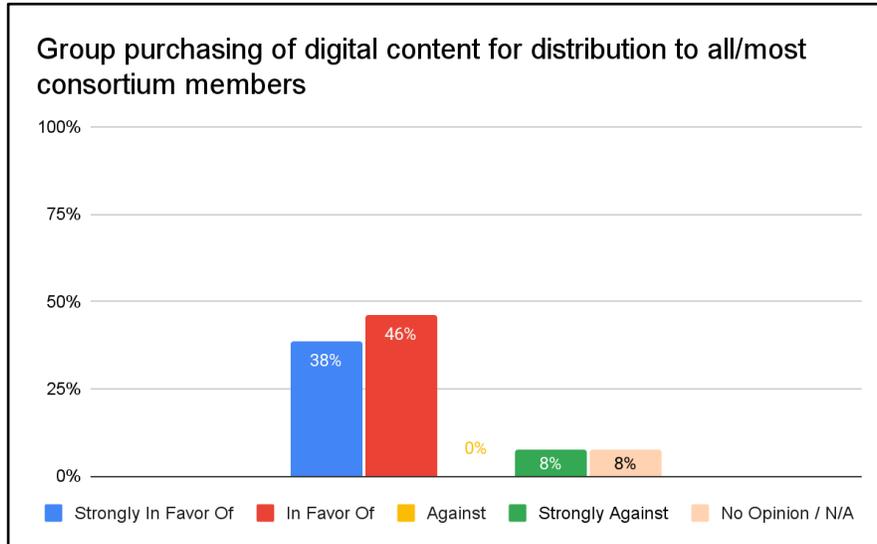
13.5.9. Help personalizing catalog for local libraries



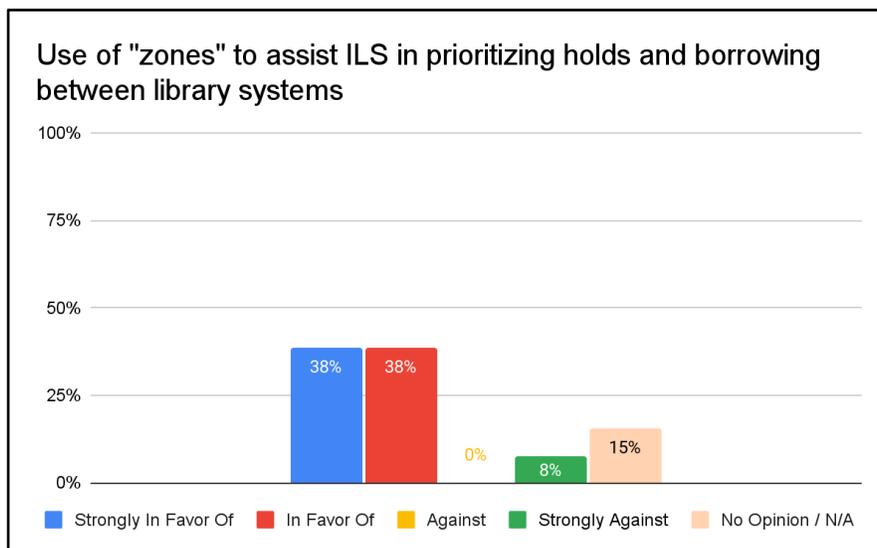
13.5.10. Central storage for items that are valuable to a collection but not in high demand (e.g., special collections like holiday books, and out of date but historically important books)



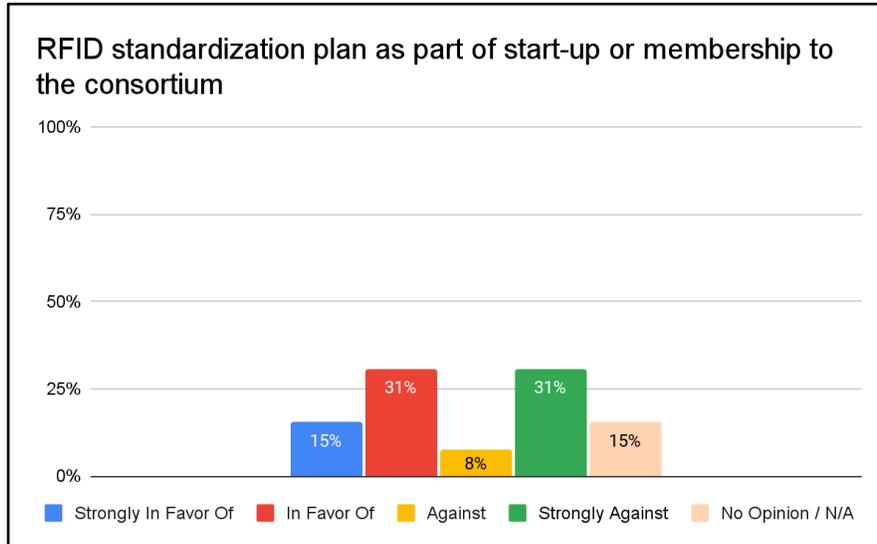
13.5.11. Group purchasing of digital content for distribution to all/most consortium members



13.5.12. Use of "zones" to assist ILS in prioritizing holds and borrowing between library systems



13.5.13. RFID standardization plan as part of start-up or membership to the consortium

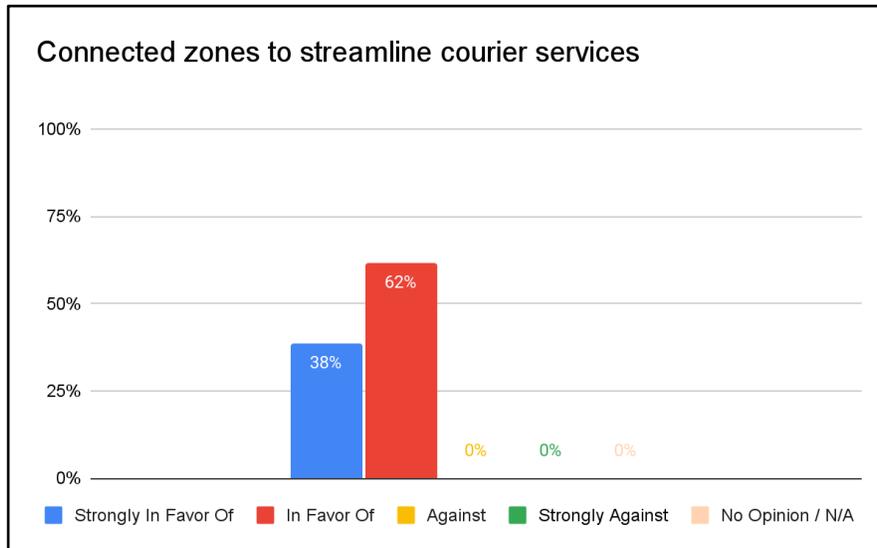


13.5.14. Consortium Services Needs and Wants Comments

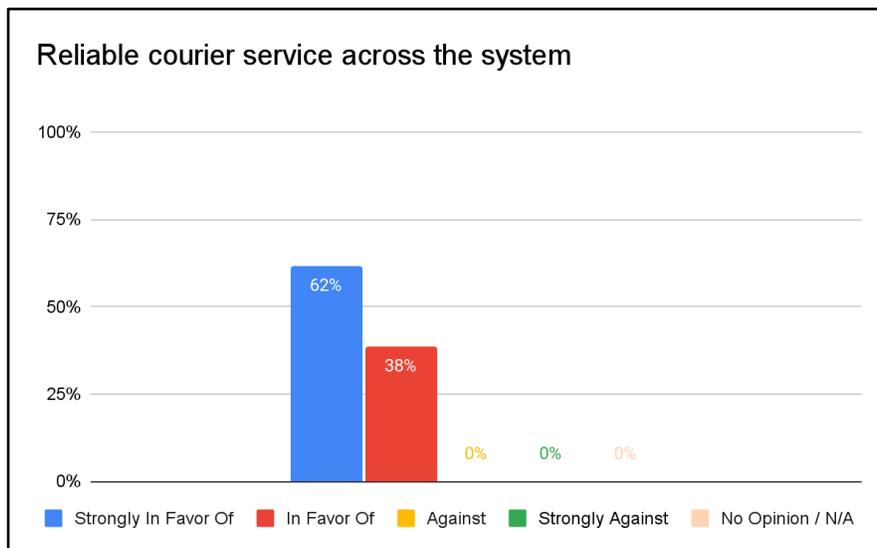
- *Our library wants to retain local control over collection development and to be able to correct errors in the catalog in an easy and timely manner. That may not be the case if there is a centralized cataloging department or if collection development policies are decided on the system level. My opposition to RFIDs are about cost for the equipment and so forth since we are not currently using them.*
- *There is no way that we can have a combined collection development policy and management across all of us. We have very different needs. Also, we don't have the money or time for RFID, and I don't think we should be punished for it. Centralized cataloging won't work for the way we purchase items and work with our business office because we'd have to have them shipped here, and then ship them somewhere else. And sometimes we need certain items right away. However, I would like to have a cataloger to consult.*
- *Installing 30,000 RFID tags would be extremely expensive and time consuming. This is not a realistic scenario.*

13.6. Needs and wants arising from the question, "Describe your desires for Courier Service as part of any possible new consortium."

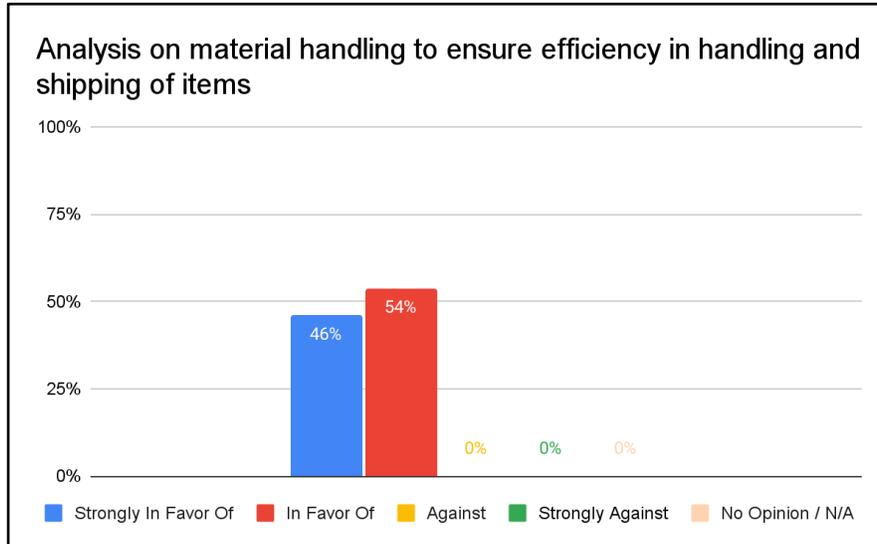
13.6.1. Connected zones to streamline courier services



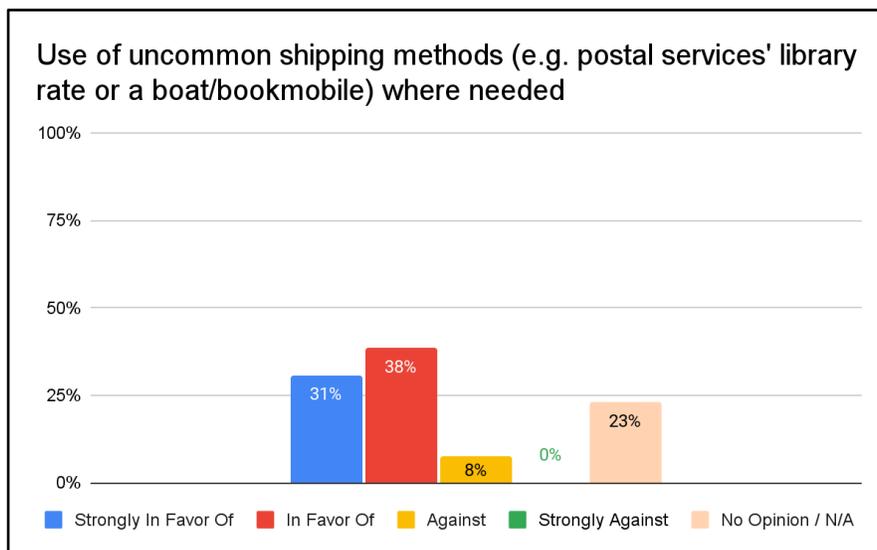
13.6.2. Reliable courier service across the system



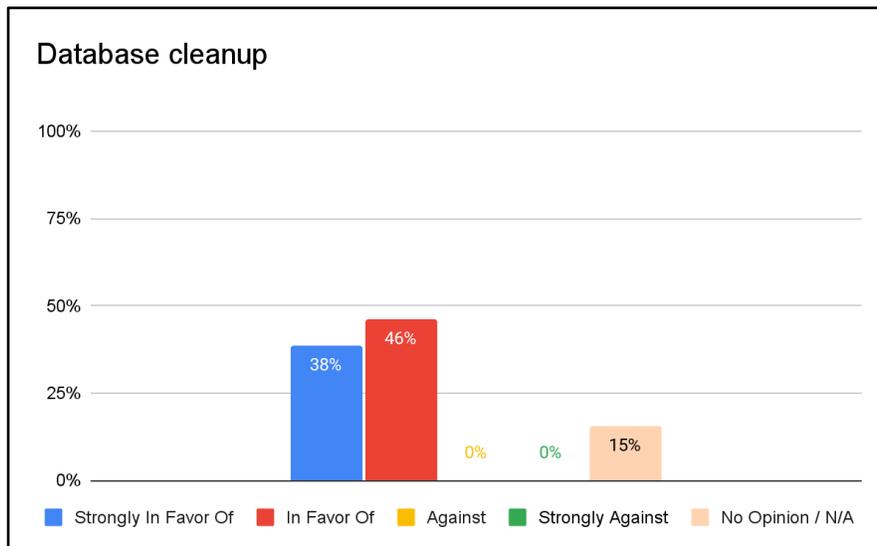
13.6.3. Analysis on material handling to ensure efficiency in handling and shipping of items



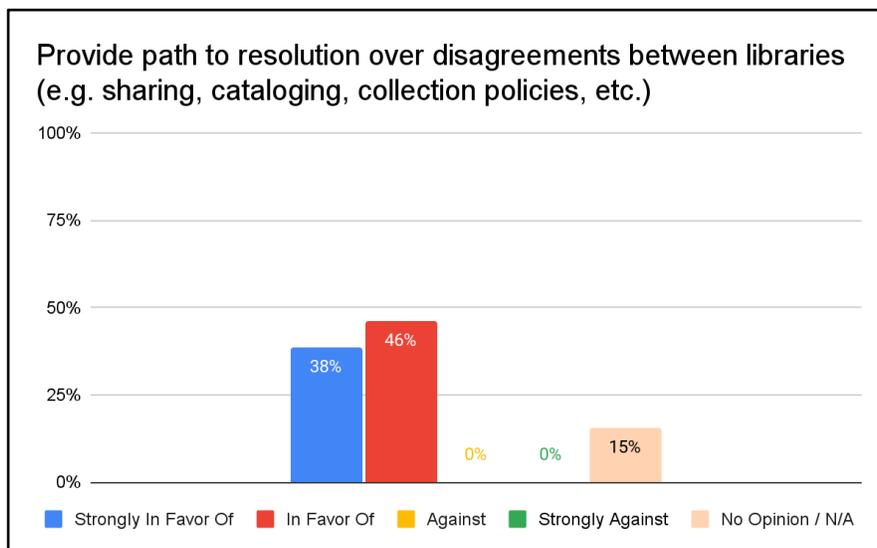
13.6.4. Use of uncommon shipping methods (e.g., postal services' library rate or a boat/bookmobile) where needed



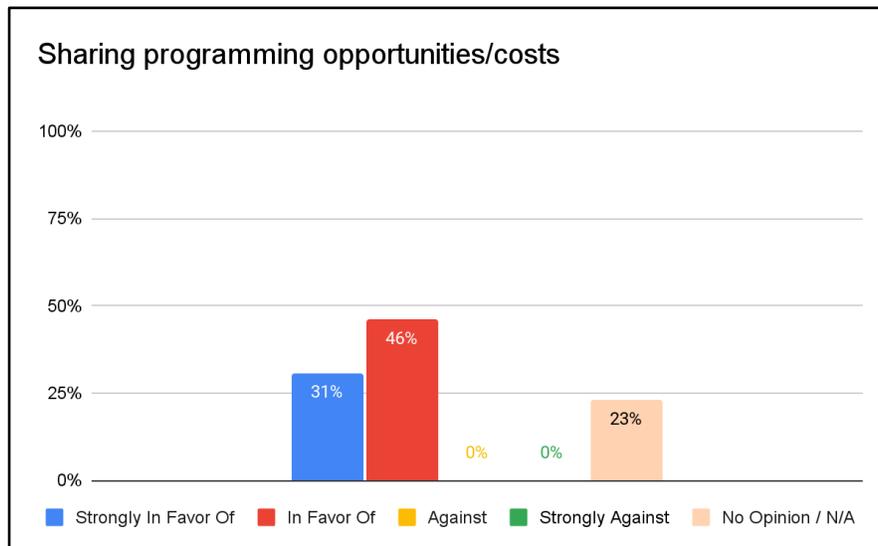
13.6.5. Database cleanup



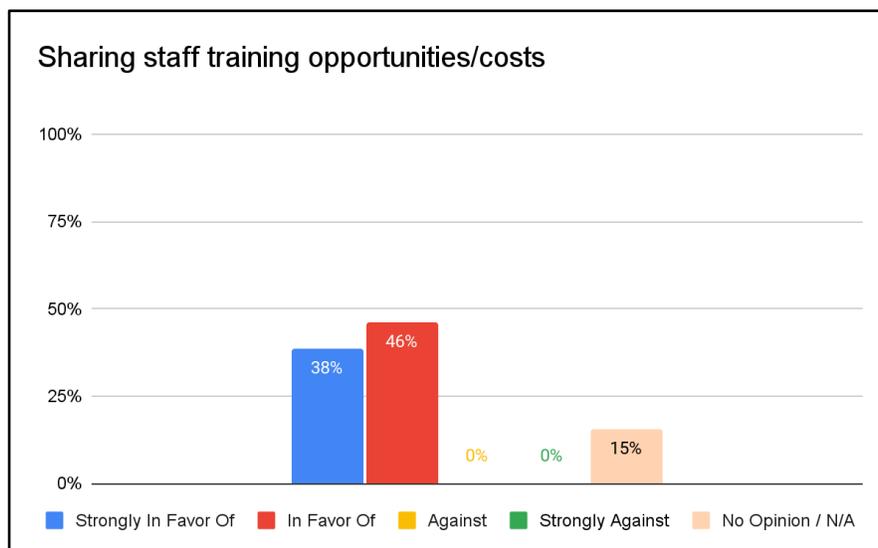
13.6.6. Provide path to resolution over disagreements between libraries (e.g., sharing, cataloging, collection policies, etc.)



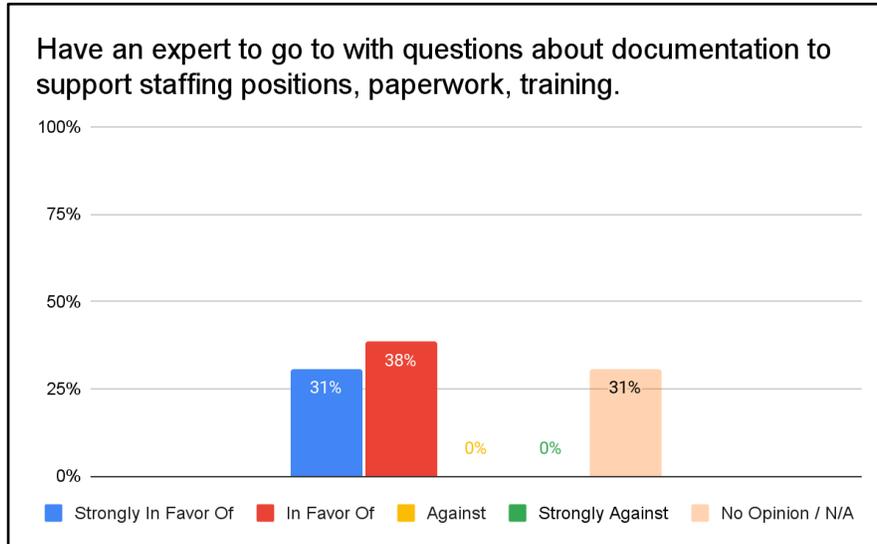
13.6.7. Sharing programming opportunities/costs



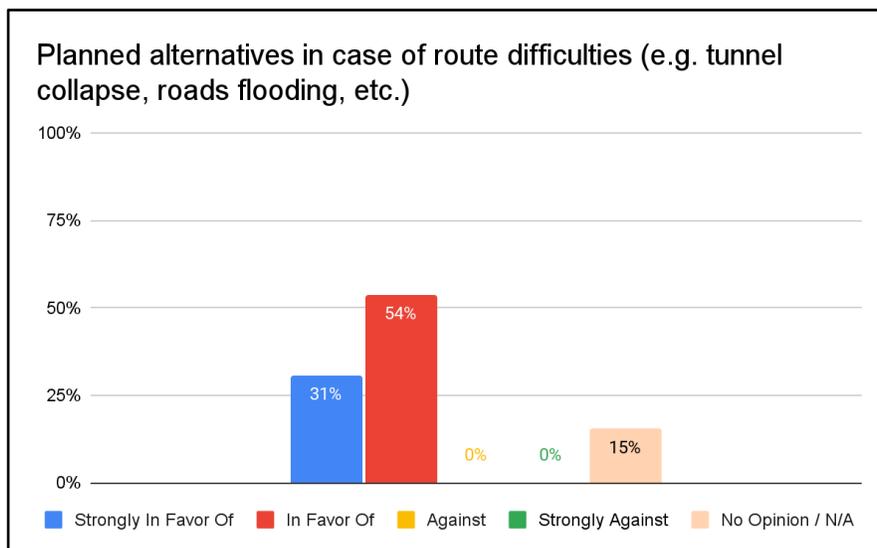
13.6.8. Sharing staff training opportunities/costs



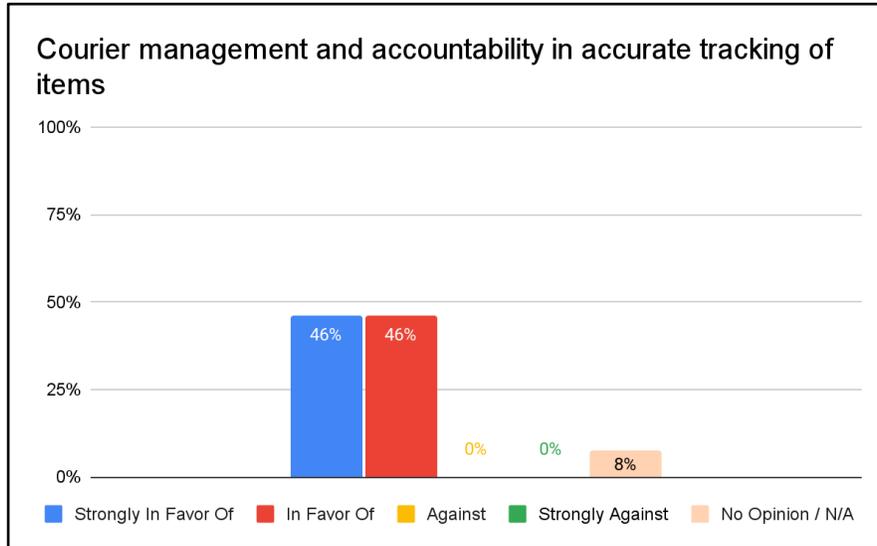
13.6.9. Have an expert to go to with questions about documentation to support staffing positions, paperwork, training.



13.6.10. Planned alternatives in case of route difficulties (e.g., tunnel collapse, roads flooding, etc.)



13.6.11. Courier management and accountability in accurate tracking of items

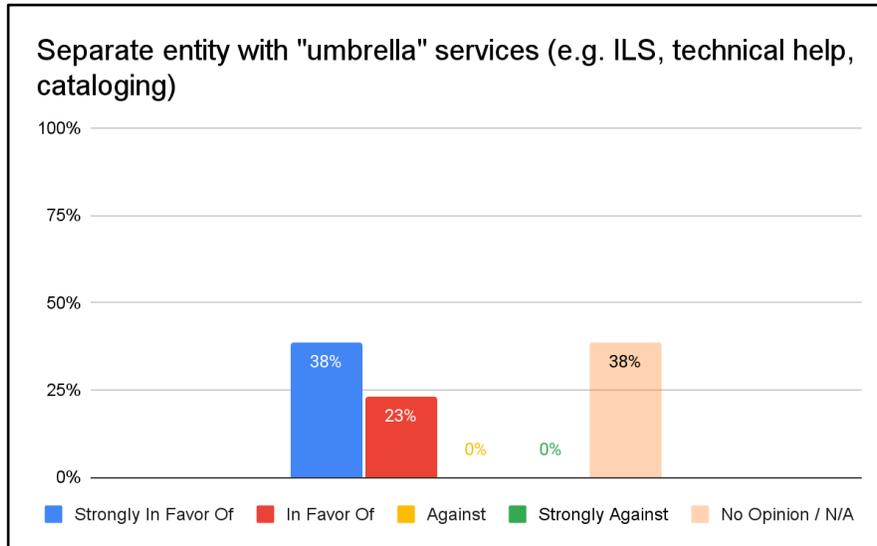


13.6.12. Courier Services Needs and Wants Comments

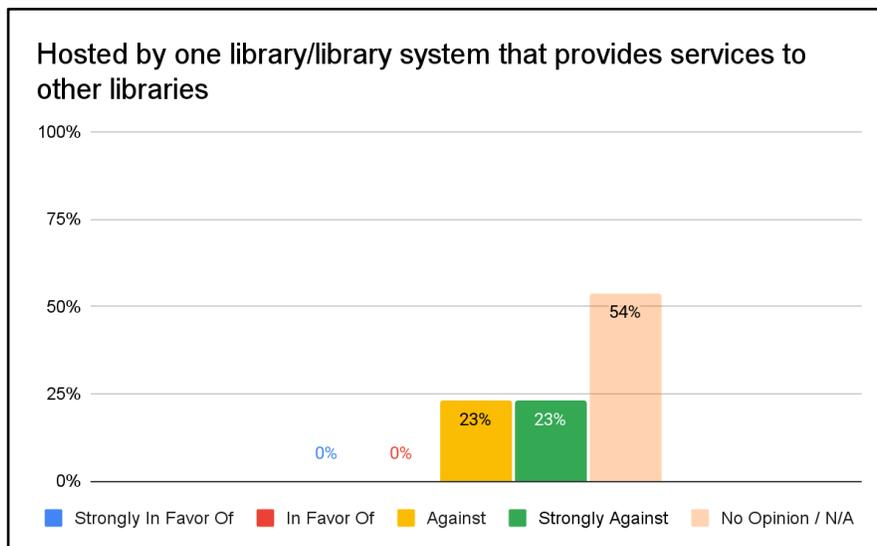
- Database cleanup for the ILS would be good.

13.7. Consortium Structure - Separate Entity or hosted by one library / library system?

13.7.1. Separate entity with "umbrella" services (e.g., ILS, technical help, cataloging)



13.7.2. Hosted by one library/library system that provides services to other libraries



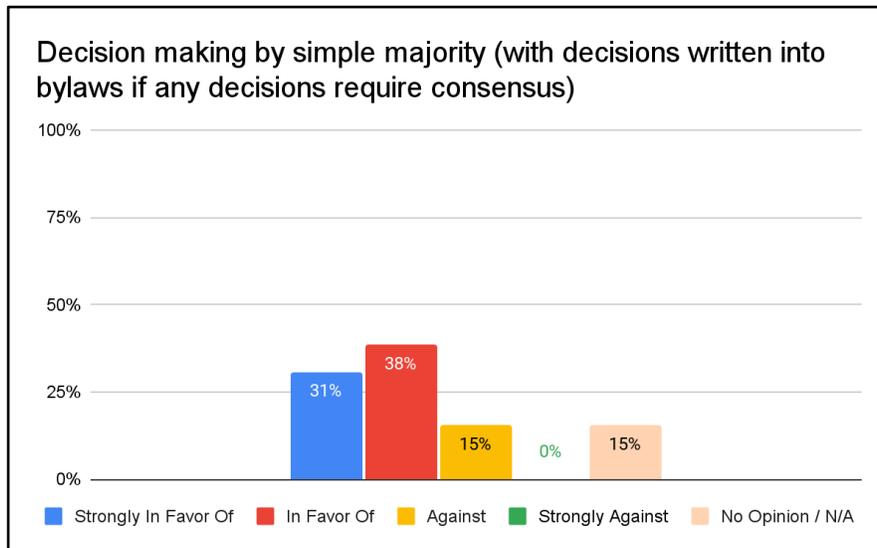
August 2022

13.7.4. Consortium Structure Needs and Wants Comments

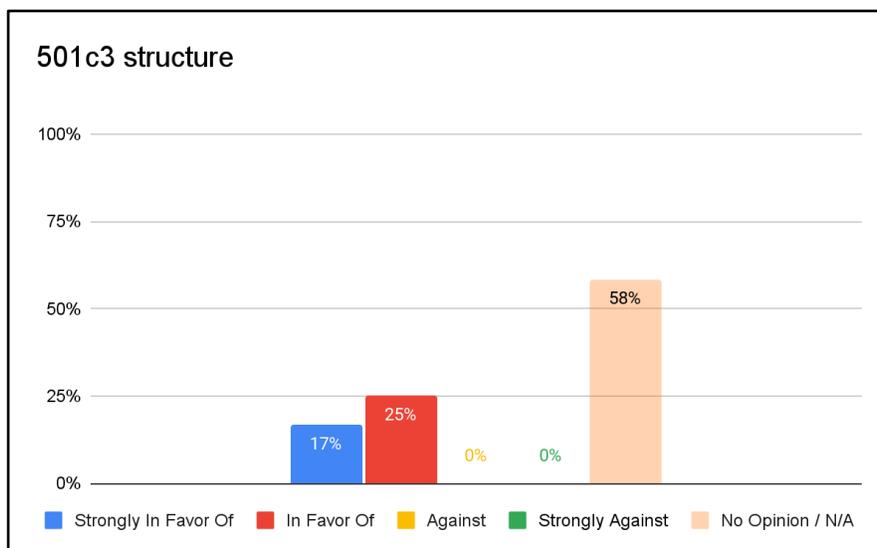
- *I think this question is asking if one library/library system should be in charge of the consortium? If that is correct then I am opposed to that idea as I think it would be more equitable if libraries could decide the best course of action together rather than having one library dictate what everyone else should do.*
- *I don't think we need a full separate entity that can do cataloging services. I would even say that we can have most of the staff hosted at one library but paid for by the consortium, or someone who works part-time for a library and part-time for the consortium. If we have to pay to rent a building and hire staff, we're looking at a very big project.*

13.8. Governance needs and wants arising from the question, "Thoughts on Governance Structure?"

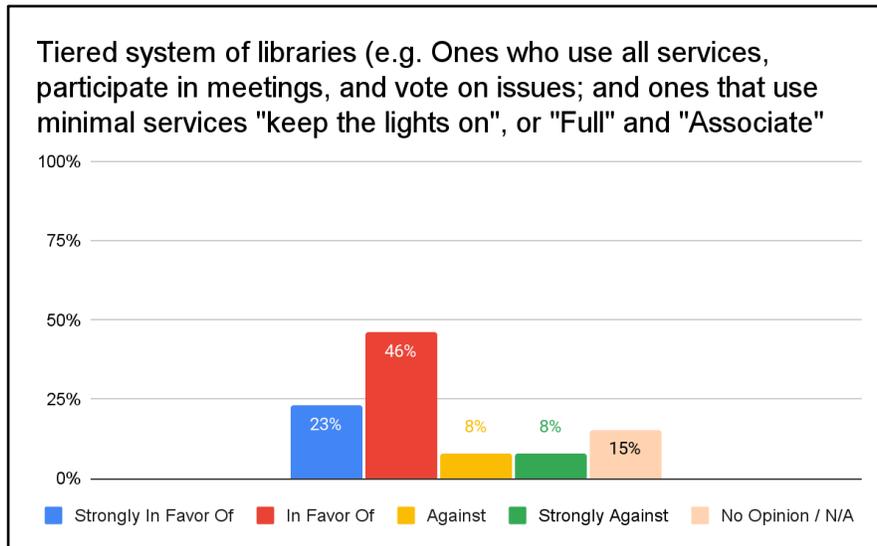
13.8.1. Decision making by simple majority (with decisions written into bylaws if any decisions require consensus)



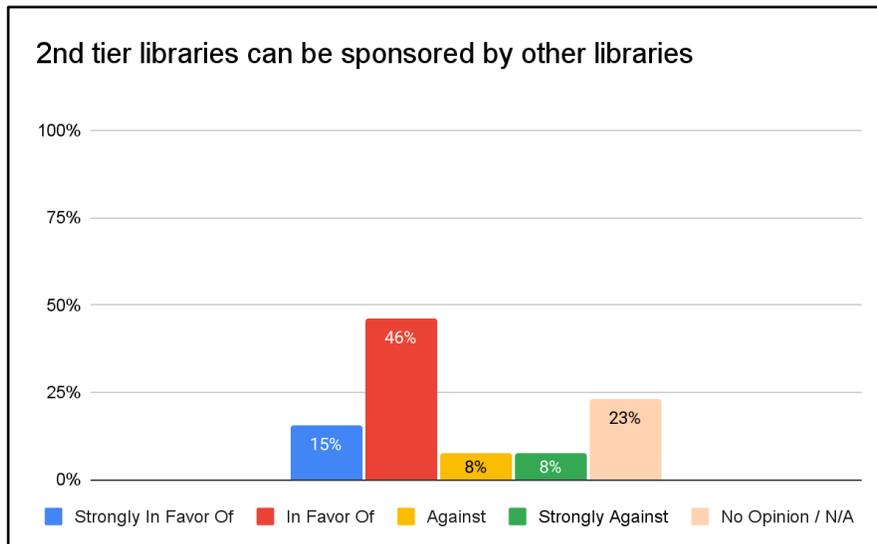
13.8.2. 501c3 structure



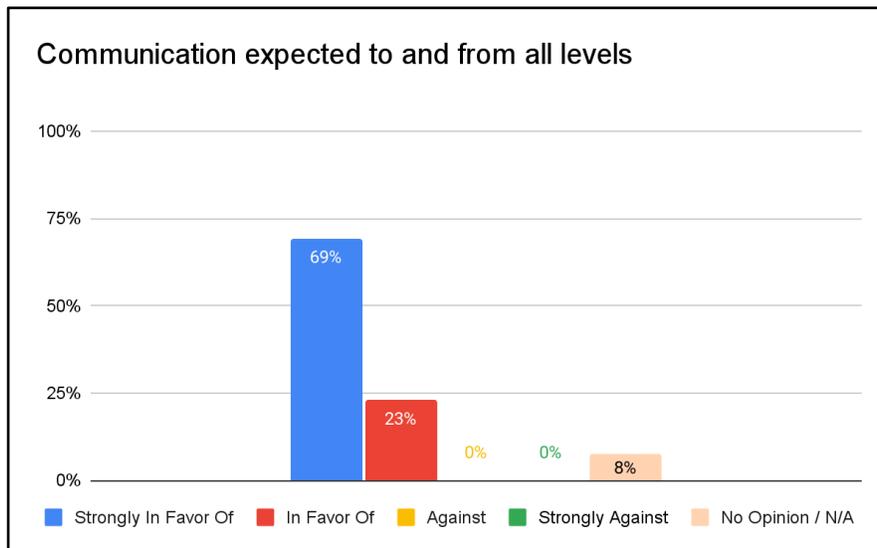
13.8.3. Tiered system of libraries (e.g., Ones who use all services, participate in meetings, and vote on issues; and ones that use minimal services "keep the lights on", or "Full" and "Associate" members)



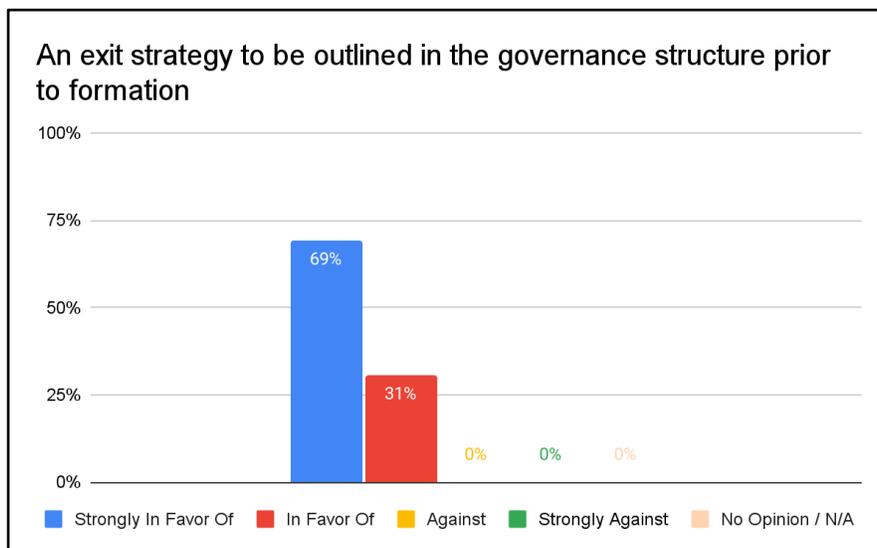
13.8.4. 2nd tier libraries can be sponsored by other libraries



13.8.5. Communication expected to and from all levels



13.8.6. An exit strategy to be outlined in the governance structure prior to formation



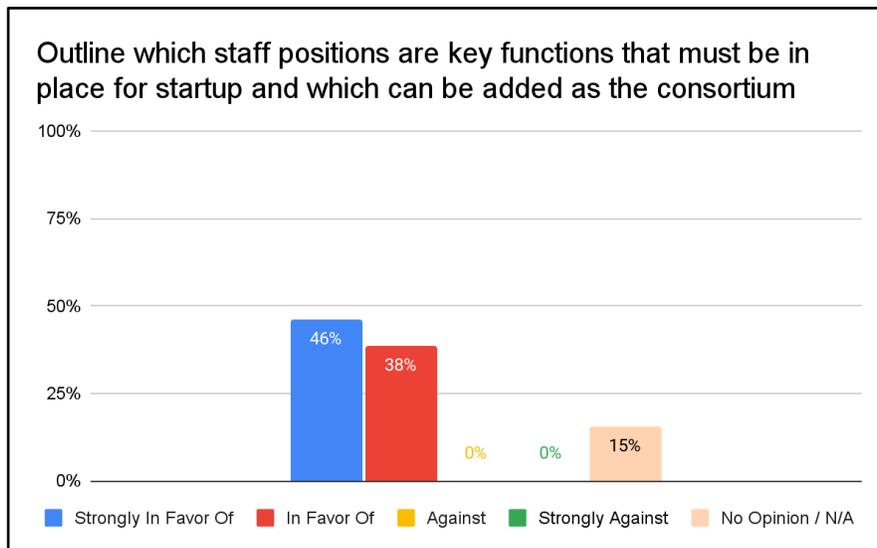
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13.8.7. Consortium Governance Needs and Wants Comments

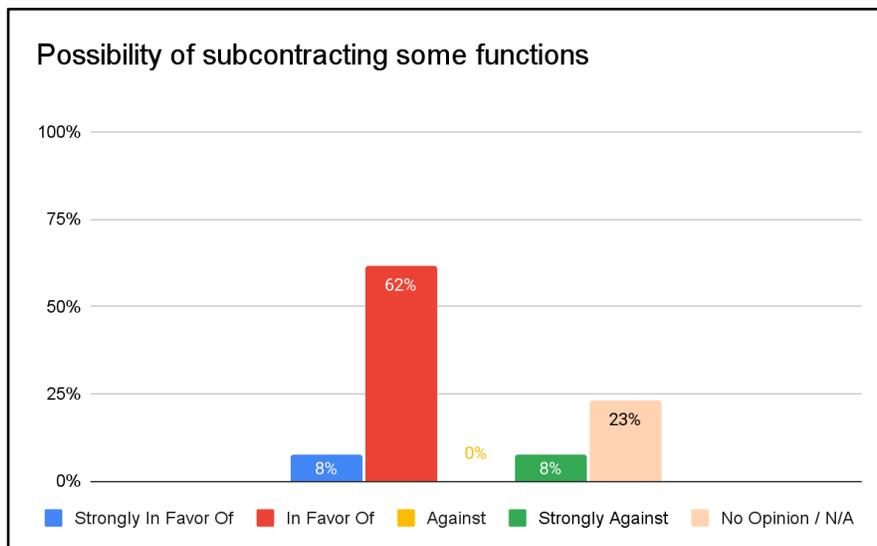
- *I don't agree that some libraries should have a lesser vote and that we should have "full" or "associate" members. I don't want to be a lesser member just because I'm a small community college. I think if big libraries want extras, they should be able to add those, but I think most libraries are small libraries. I think most decisions should be consensus ones, with some decisions written into bylaws as majority ones.*
- *I'm concerned about "simple majority" decision-making, given the differences in library size, funding, etc.*

13.9. Staffing needs and wants arising from the question, "Thoughts on Staffing Structure?"

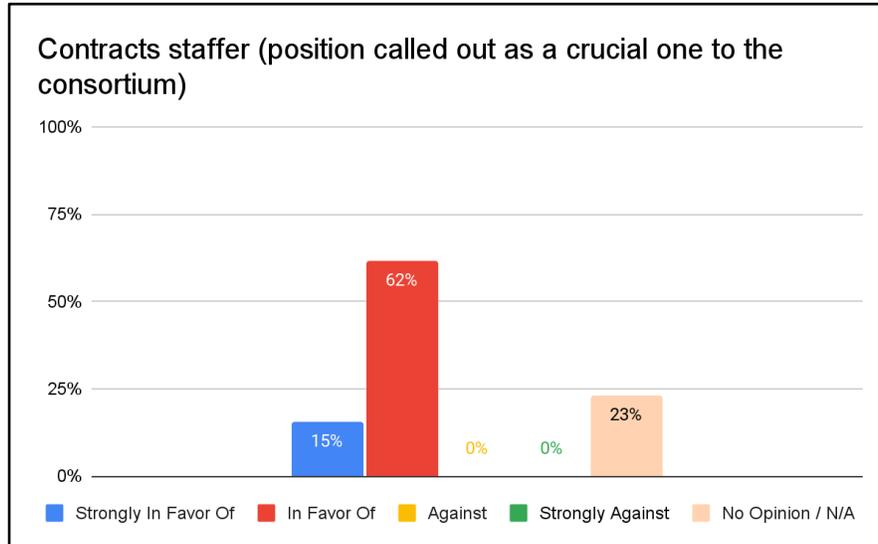
13.9.1. Outline which staff positions are key functions that must be in place for startup and which can be added as the consortium grows



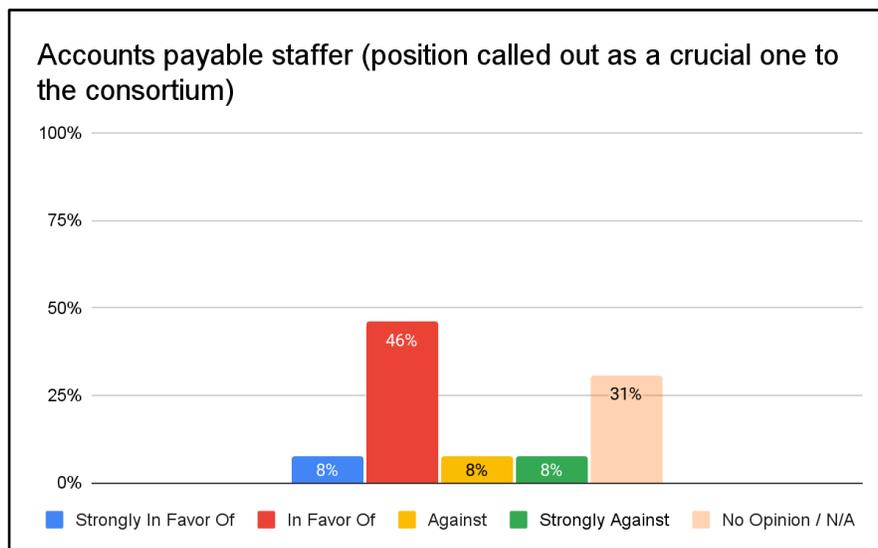
13.9.2. Possibility of subcontracting some functions



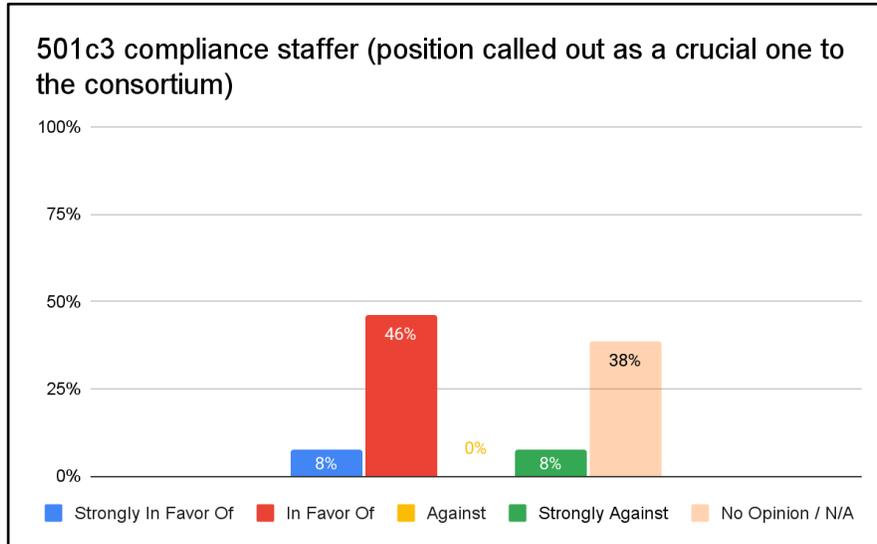
13.9.3. Contracts staffer (position called out as a crucial one to the consortium)



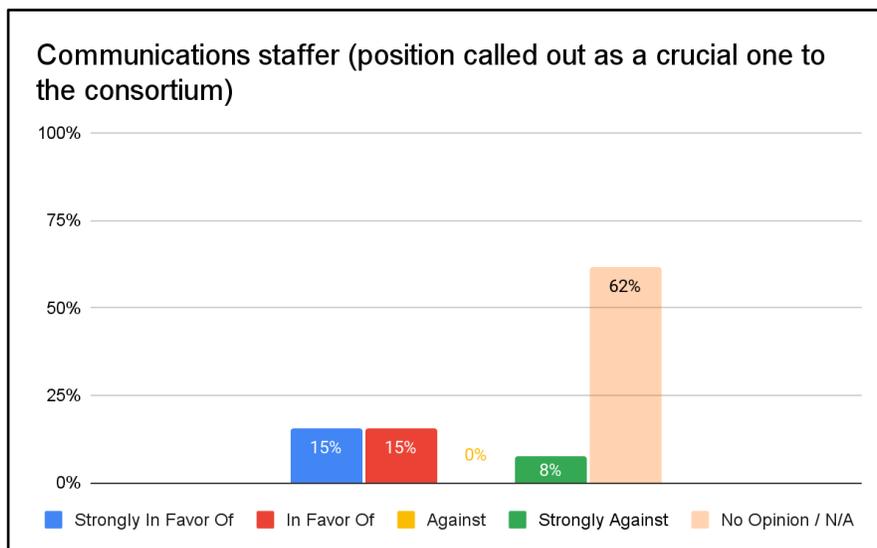
13.9.4. Accounts payable staffer (position called out as a crucial one to the consortium)



13.9.5. 501c3 compliance staffer (position called out as a crucial one to the consortium)



13.9.6. Communications staffer (position called out as a crucial one to the consortium)



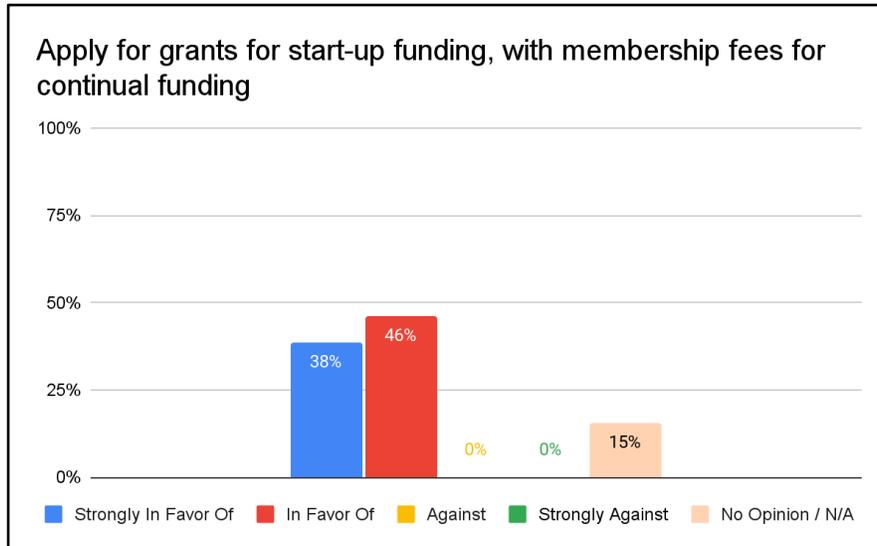
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13.9.7. Consortium Staffing Needs and Wants Comments

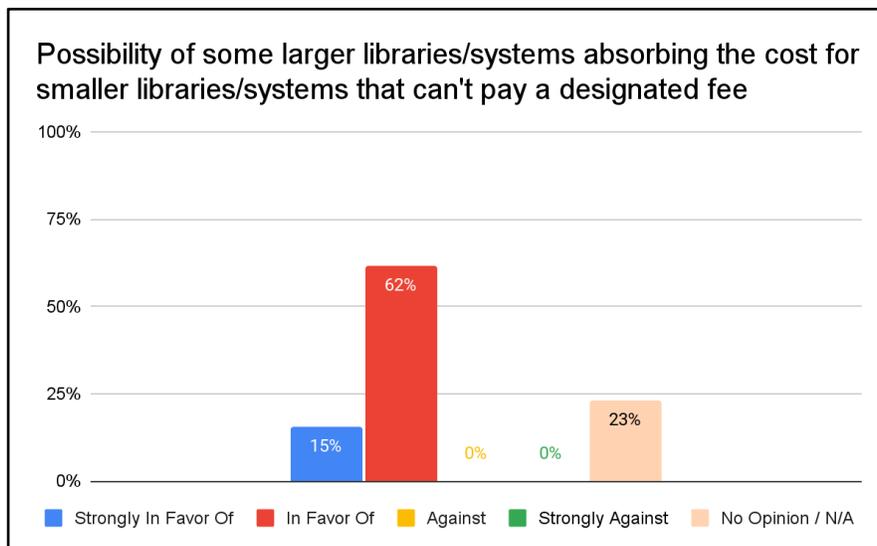
- *I don't think we want to be a big enough group to need and accounts payable staff position, and I didn't realize we'd need a 501c3 position. The subcontracting question depends. I was only imagining 2-3 staffers: someone to help with the ILS and cataloging and someone to be a main contact and communication person. If we're going to have more, I'd need a price estimate before moving forward.*
- *I don't feel strongly one way or the other about a communications staffer.*

13.10. Funding / Fee Structure needs and wants arising from the question, "Thoughts on Funding or Fee Structure?"

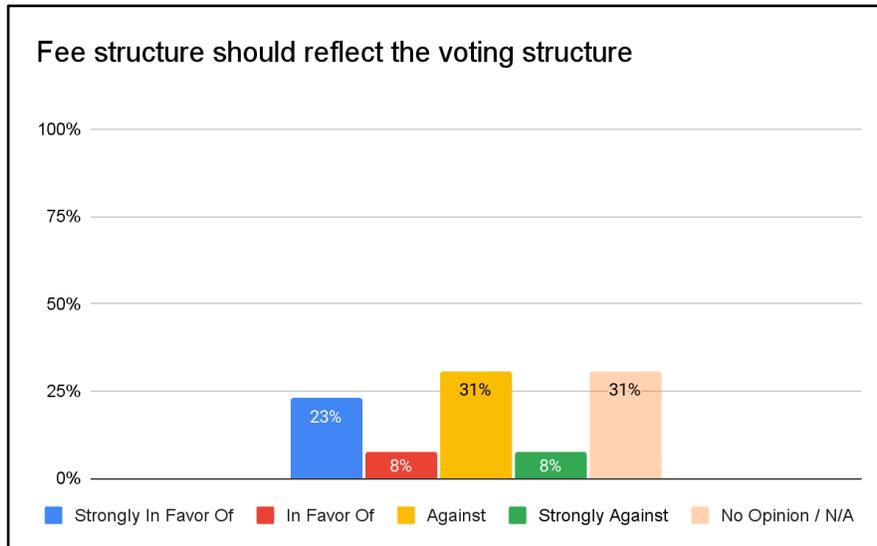
13.10.1. Apply for grants for start-up funding, with membership fees for continual funding



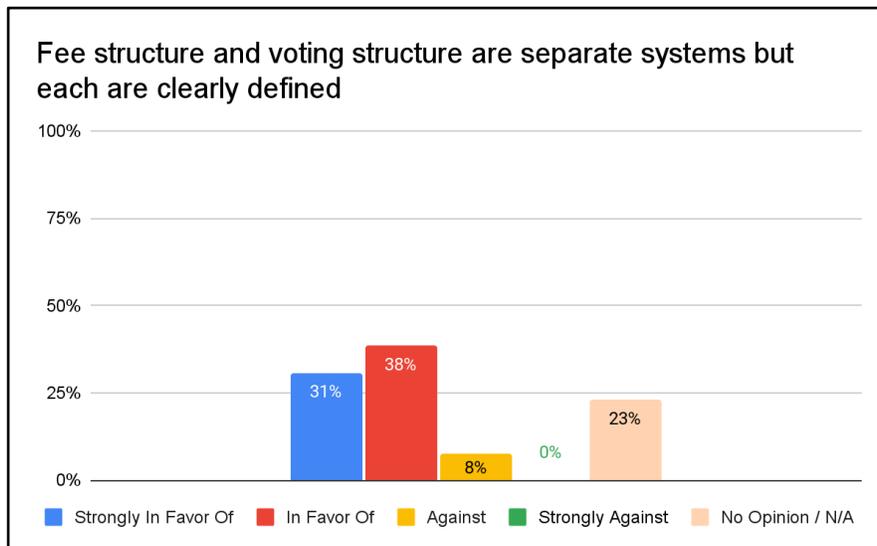
13.10.2. Possibility of some larger libraries/systems absorbing the cost for smaller libraries/systems that can't pay a designated fee



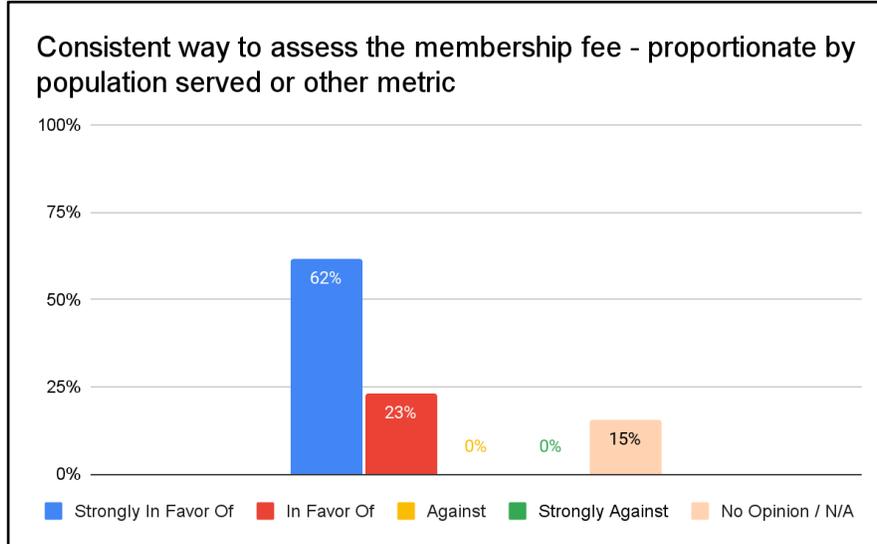
13.10.3. Fee structure should reflect the voting structure



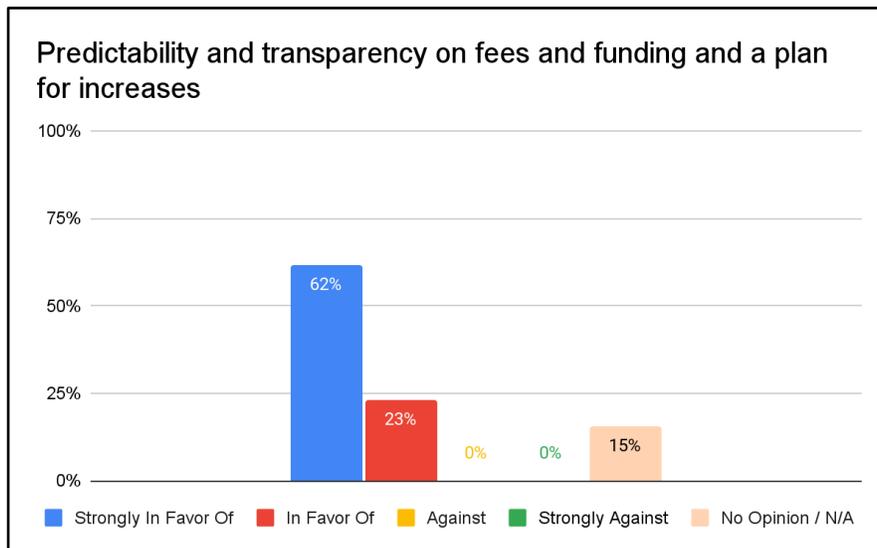
13.10.4. Fee structure and voting structure are separate systems but each are clearly defined



13.10.5. Consistent way to assess the membership fee - proportionate by population served or other metric



13.10.6. Predictability and transparency on fees and funding and a plan for increases



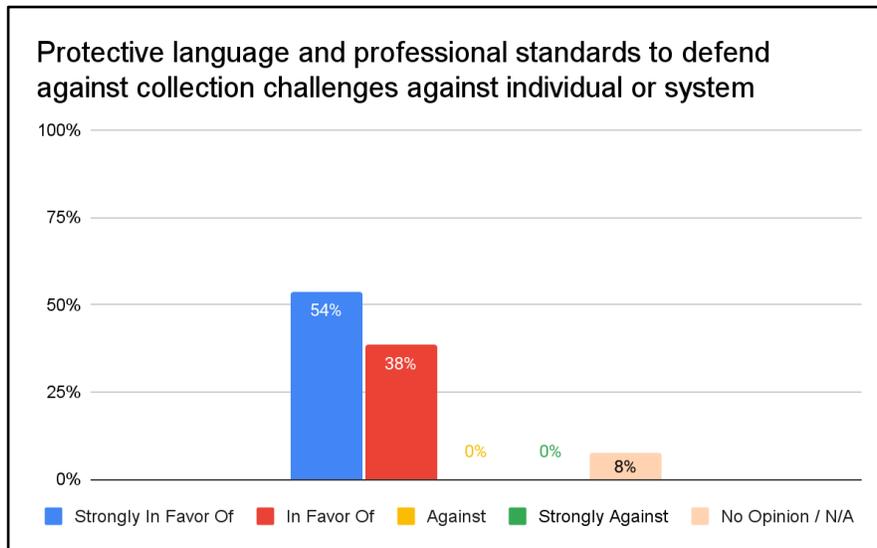
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13.10.7. Consortium Funding/Fee Structure Needs and Wants Comments

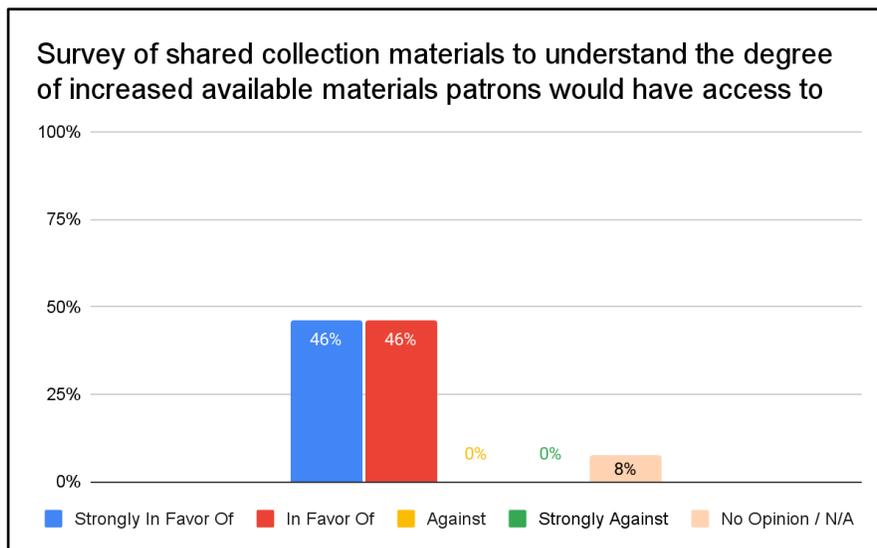
- *Would the membership fee be in addition to a courier fee and ILS fee? The courier fee is already the single biggest cost my library has unless I add up my databases. Does this question mean that we will definitely have a membership fee? That wasn't discussed at all. I like the idea of grants, but who will write them?*

13.11. Consortium Structure - Other Thoughts

13.11.1. Protective language and professional standards to defend against collection challenges against individual or system libraries



13.11.2. Survey of shared collection materials to understand the degree of increased available materials patrons would have access to (e.g., this consortium has access to # of unique items")



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13.11.3. Other Thoughts Comments

- *I'm in favor of these two, but they are at the bottom of my priorities list. I'm in favor of starting a consortium that's simple and focuses on the main things like the shared ILS and courier. As we go along we can add additional features like shared cataloging, programming, purchasing of certain things, etc. Some of these ideas are nice, but without knowing the price tag I'm hesitant to commit to them.*

13.12. What other comments or questions do you have about assessing, selecting, planning for, or implementing a new consortium?

- *1.) What amount of local control would be retained by individual libraries? 2.) Are votes by system or by libraries within a system? For instance, would a system of two libraries get two votes because it is two libraries or one vote because it is one system? 3.) Are votes otherwise weighted based on geographic size of area served, population served, size of collection, etc.?*
- *I'm in favor of starting a consortium that's simple and focuses on the main things like the shared ILS and courier. As we go along we can add additional features like shared cataloging, programming, purchasing of certain things, etc. Some of these ideas are nice, but without knowing the price tag I'm hesitant to commit to them. The one consortium I have the most inside experience with was basic: shared ILS and someone who could manage the ILS and catalog, and occasional meetings between directors and staff to smooth out policies, create marketing materials, and deal with the courier. That's kind of the level I'm thinking, but maybe a bit more advanced. While I like the idea of having a separate entity and staff, I need to know how much it will cost. I'm very wary of not having a vote if I can only buy in as a second tier library. I think it would make more sense to have a group of larger libraries that can buy into extra services; and then they would be the only ones who could vote on those services. Or, we have one larger consortia group with two different working groups--community college and public library--that can decide to share certain costs for programming and specialized databases.*
- *I'm concerned about the cost-split, as our budget has little flexibility in this area. I'm worried that I'll have invested many hours in this planning process, only to have it out of our price range.*
- *Need a new MaryKay. Seriously, search and interview for new director should be taken very seriously.*
- *I am new to Tillamook County Library, so I do not have some of these opinions formed yet or fully understand the landscape.*

14. Appendix: Attribution

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