

Migrating Nonautomated Libraries into Missouri Evergreen



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Restoring Connections

When COVID hit, Reynold's County Library management realized that being non-automated left them with little opportunities to stay connected with their patrons.

While the libraries were closed and/or limited staffing, patrons did not have access to an online catalog to browse and place items on hold.

Megan and the former Director, Pat, recognized the needed to automate their 5 branches and provide a better way to offer services to their patrons.

Implementation Considerations

- Grant Process
- Missouri Evergreen Onboarding Support
- Weeding Your Collection
- Patron and Item Barcodes / Rebarcoding
- Cataloging Materials
- Resource Sharing
- Policy changes -Thinking about the future as an automated library
- Library staff expectations during the implementation
- Stakeholder communication

Grant Process

Cost Considerations

- Peripheral Devices
 - Circulation Computers
 - Scanners
 - Printers
 - Receipt Printers (and paper)
 - Spine Label Printer
 - Business Printer (ex. Needing color prints of promotional materials - Reynolds' didn't even have a color printer)
- Barcodes and Cataloging Supplies
 - Patron Barcodes
 - Item Barcodes
 - Spine Labels and Label Protectors
- Resource sharing
 - Totes/packaging
 - Shelving and Physical Spaces
- Staff hours
 - Additional time needed for training, weeding, rebarcoding, cataloging

Missouri Evergreen Onboarding Support

Onboarding support is crucial for non-automated libraries.

ME offers:

- Onboarding Team consisting of Migration Coordinator (ME Executive Director); Migration Partner (Library who migrated from same ILS or neighboring ME library); Equinox Training Team; and ME Consortium Cataloger.
- Cataloging Training - Basic and Advanced Cataloging Self Paced Courses
- Circulation Training
- Resources - Missouri Evergreen has six (6) email listservs to keep membership updated about new developments and to collaborate on issues.
- Resource Sharing is delayed between 2 and 4 weeks to allow new libraries time to acclimate.
- As a consortium **governed** and **supported** by members, we **encourage** member libraries to **participate fully** on governance committees, at conferences and meetings, and on our email discussion listservs from day one!

Weeding Your Collection & Databases

Now is a great time to purge old data.

- Delete lost and missing items
- Remove long expired patrons in your old ILS
- The cleaner your database before migrating, the smoother your transition into ME will be.
- Have a timeline prepared; be realistic in your estimates
- Weeding Policy? C.R.E.W. Method = **C**ontinuous/**R**eview/**E**valuation/**W**eeding

Using MUSTIE Guidelines = **M**isleading **U**gly **S**uperseded **T**rivial **I**rrelevant **E**lsewhere

- Reason to Weed = Space, Time, Collection Appeal, Relevance, & Reliability
- Include Reference & non-book materials (i.e. audio cassette tapes, floppies)
- **KEEP** genealogical or historical materials pertinent to your library!
- Rebind, Mend, Replace, Promote materials if not weeded
- Recycle, sell, donate, or destroy (gasp!) weeded materials
- Database Cleanup entails removing expired patrons, correcting addresses, merging patron accounts if needed

Why you may need to potentially rebarcode patrons and/or items

Item barcode numbers, patron barcode numbers, and patron usernames within Missouri Evergreen must be unique across all libraries.

- This includes both *incumbent* (the migrating library's data checked against existing ME data) and *incoming* (checking for duplicates being used at the incoming library)
- The barcodes of the incumbent libraries take precedence over the incoming library barcodes

Missouri Evergreen Barcode Scheme

- Barcode Type:
 - 14 digits using the CODABAR symbology
 - Check digit algorithm: Mod 10
- Barcode Prefix:
 - Patron Barcodes: '2' + four digit code assigned by ME
 - Item Barcodes: '3' + four digit code assigned by ME
- Starting number, not counting the prefix and the check digit: '1', left-padded with zeros
- The four digit code assigned by ME is the last four digits of the library's phone number
- For example, Reynold's Barcodes:
 - Patron Barcode Prefix is 22471
 - 2 + 2471 (where 2471 matches the last 4 of Centerville's phone number)
 - Item Barcode Prefix is 32471
 - 3 + 2471 (where 2471 matches the last 4 of Centerville's phone number)
- Noting possible variations on a case-by-case basis

Estimated Time to Rebarcode

REBARCODING TIMELINE ESTIMATES w/ 1 FTE, 30 items/hr			
Collection Size	Hours at 30 items per hour	Weeks at 1 40-Hour full time	Months
15000	500	13	4 months
25000	833	21	5 months
50000	1,667	42	10.5 months
75000	2,500	63	1 year 4 months
100000	3,333	83	1 year 8 months

Cataloging Materials

Remote Cataloging

- Reynolds County Library received remote cataloging assistance from other ME libraries using a spreadsheet that listed the book information on it
- Over 40,000 library items were individually entered into the Missouri Evergreen database.

What is Resource Sharing

Within Missouri Evergreen, resource sharing can be defined as the act of allowing patrons to request and check out materials from any members of the consortium.

- ME libraries share bibliographic records
- Staff members with the appropriate permissions have the ability to view patron and item records held at other libraries

Resource Sharing Expectations

- What materials ME libraries are expected to share
 - Examples: Audiobooks, Books, DVDs
- What materials ME libraries *may* choose *not* to share
 - Examples: Hotspots, Laptops, Kits, Genealogy Materials
- When incoming libraries are expected to begin sharing
- How materials are to be packaged and shipped
- Hold policy precedence
- Circulation policy precedence
- Understanding the distinction between agreeing to share items within ME versus maintaining library autonomy
 - Example: Your patrons may be limited to placing 2 DVDs on hold, while another ME library may allow 10 or even unlimited

Resource Sharing Expectations cont.

Once you join Missouri Evergreen, expect a significant increase in the number of outgoing and incoming hold transits.

- You will initially see more outgoing items, until your patrons begin to fully utilize the ME hold options (learned through patron education)
- New libraries experience what the greater Evergreen community describes as the “**Evergreen effect**” - where joining into an Evergreen system results in this increase
- Incoming libraries should be prepared for this significant increase in hold request activity, in terms of staffing, workspace to accommodate the holds processing, materials needed
- Don't forget about the mental preparation for this change

Resource Sharing Statistics

Carrollton Public Library

- Municipal library migration, August 2012
- Population less than 4,000

Then:

- ILL included less than 10 items per month received from KCPL or MCPL
- Annual ILL circulation was 110+/- with very intensive staff time to complete lending protocols
- CPL loaned 0, zero, zilch items from their collection!

Now (2021 Materials):

- ME Consortium Libraries materials Borrowed from CPL **Total: 2583**
- CPL materials Loaned to ME Libraries **Total: 2581**

Reynolds County Library

- Regional Library system with 5 libraries, spread over 100 miles

Then:

- ILL had less than 100 items borrowed from MCPL

Now:

- ME Consortium Libraries materials Borrowed from RCLD **Total: 2935**
- RCLD materials Loaned to ME Libraries **Total: 952**

What Resource Sharing Entails: Carrying It Out

- Prepare Staff for the change of time and resources that will happen once resource sharing begins
- Make space for physical items such as shelves, totes, and bags
- Bubble wrap for DVDs and Audio Books

Policy Considerations

Library policy as a non-automated versus how those policies may change once automated

- Many of Reynolds County Library Policies are in the process of changing due to the automation process.
- Our old workflow of checkout cards and patron signatures no longer works in an automated environment.
- Going Fines Free? Your patrons may still be held accountable to the other MEC libraries' materials.
- Collection Development or Selection Policy
- Weeding Policy

Expectations of Library Staff during the Implementation

- Assign a staff member to act as the library project manager and primary contact for Equinox during the implementation
- Ensure one or more staff members, familiar with your library's patrons, policies, and items will participate in the implementation
 - It's helpful to include your primary cataloger and/or circulation supervisor in the data and policy mapping discussions
- Ensure staff can participate in training on your new ILS
 - We generally recommend that all staff attend the Circulation training
 - This may require you to adjust staff schedules and/or close the library for staff development
 - Administration, Cataloging, and Reports are generally attended by staff specific to these workflows
- Assign designated staff to carefully review the migrated data during the testing period and 30 day post-production period
- Work with your third-party vendors, making them aware of your migration and any patron authentication / sign-on requirements

Stakeholder Communication

Change is hard. The key is communication!

- Missouri Evergreen Consortium - a whole lot of new friends and mentors!
- Board Members - explain ILS difference & savings
- Staff - prepare them for changes
- Patrons - patron education is paramount

Was all of the hard work worth it?

Yes!

Many of our library patrons never had a library card to carry.

Questions?

Thank you for joining us! We would also like to acknowledge our families and colleagues who helped make it possible for us to be here together this afternoon.



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Websites



Missouri Evergreen <http://moevergreenlibraries.org>



Evergreen Community <https://evergreen-ils.org>



Equinox <https://www.equinoxoli.org>



Livingston County Library
<https://www.livingstoncountylibrary.org>



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