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# SEO MEMBER MEETING FACILITATION

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December 9, 2013 meeting: Final Report



# INTRODUCTION

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The staff of the [SEO](#) (Serving Ohioans Everywhere) Service Center, a division of the [State Library of Ohio](#), held a meeting for member library representatives on December 9, 2013, as a means to bring the members together and talk about the issues they have been experiencing in the past 18 months since the migration from the Horizon integrated library system to the Symphony system. Karen Miller of [KMD Associates](#) facilitated the discussion.

Prior to this meeting, SEO staff sent out a survey to the member libraries (results, Appendix B) seeking detailed information about the issues the member libraries are having with the integrated library system (ILS.) The majority of the member libraries responded to the survey, and the results were compiled with the intent to share some of the information at the meeting as well as afterward in a communication to the full membership.

Meanwhile, SEO staff and Karen worked together to determine the purpose of the meeting and develop an agenda. The goal was to give member library representatives the opportunity to express their concerns and opinions about the ILS in order to try to address those concerns and move forward as an organization.

The final agenda (Appendix A) led participants through several group exercises intended to help identify the problems the libraries are having with the system, and to also address any communication issues that could be improved. One area that was unclear to the staff at SEO: are the issues with the ILS software insurmountable for the majority of the member libraries? Do the voices speaking the loudest represent the majority?

## SUMMARY OF MEETING

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Dianna Clark, Director of the SEO Service Center, opened the meeting with a welcome to everyone and introduced library staff and the libraries attending the meeting. Karen Miller then introduced herself and started off the meeting by asking participants to break into groups to identify two or three questions they hoped to have answers for by the end of the day.

The groups shared their questions with the entire assembly (Appendix C). At the end of the meeting day, Dianna and her staff shared the answers they had for these questions.

Following the group activity, Dianna shared the results of the survey the SEO staff conducted prior to this meeting. Staff created flip charts with the main ‘big ticket’ concerns suggested by the member library representatives. These items were reviewed with the group, and Dianna asked participants to verify that there weren’t any missing concerns. A few more topics were added to the charts as suggested by participants. Various participants offered their opinions on the system and its functionality and what needs to be done to improve it. When discussion finished, each library was provided with three stickers to ‘vote’ for the issues that were their highest concerns. Libraries could assign those stickers as they wished, and could apply all three to one issue. This exercise was intended to help SEO staff and the members prioritize a very large list of concerns about the ILS, in order to focus on the areas of strongest concern.

Participants were provided with time to prioritize their concerns via sticker-voting just prior to the lunch break. When the meeting resumed after lunch, Karen and the SEO staff had tallied the votes to see where the highest concerns were, and the results were shared. (Appendix D).

After the results were shared, Karen asked the group to answer this question: The number one concern indicated by the voting is “lack of trust in workflows.” What then is it going to take to restore that trust and how will you know when it happens? Contributions to this discussion are listed in Appendix E.

Following the discussion of the voting results, David Namiotka, Associate State Librarian for Library Services, provided participants with information about the timeline associated with placing an RFP (Request for Proposal), which is what the State Library of Ohio would be required to do as part of the process of selecting a new integrated library system. David shared some data indicating that it would likely take

about six months' time to start this particular part of the process of moving to a new ILS system, not including the time it would take to create the RFP or the time it would take to move through another migration.

The next agenda item led the group into a team-building discussion about communication. Participants were asked to form groups again in order to answer two questions:

1. What can the SEO staff do to help facilitate good communication and feedback with the member libraries?
2. What can member libraries do to help facilitate good communication and feedback to the SEO staff?

Results of this discussion can be found in Appendix F.

The meeting wrapped up the day with Dianna and staff answering the questions compiled from the first activity of the day (Appendix C). Participants were thanked for their time and attention. Dianna shared that the results from this December 9<sup>th</sup> meeting would be distributed to all Directors and that the advisory group would be looking at these issues as well. The topics would be revisited as a whole during the Director's Forum, planned for May 2014. Dianna stated that sub-groups would be created for various areas of the ILS system to help work through issues also. The day ended with some of the participants sharing that they felt the system and the migration had been good, from their standpoint, and thanked the SEO staff for trying so hard to accommodate everyone's needs.

The meeting was adjourned at 3:20pm.

## APPENDIX A

### FINAL AGENDA FOR SEO DECEMBER 9, 2013 MEETING

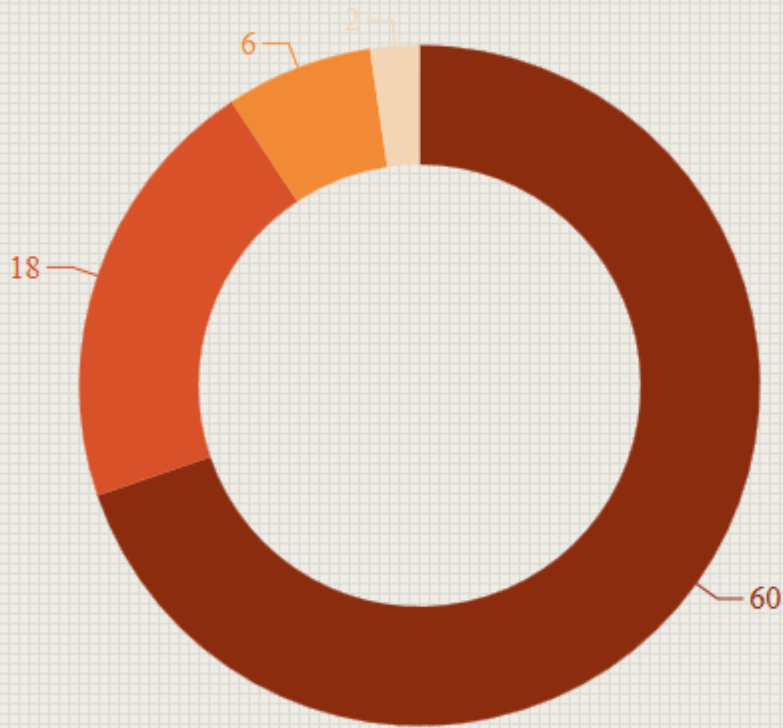
1. Welcome and introductions:
  - a. Dianna will introduce staff and state library staff, Karen introduces herself
  - b. Introduce library groups
  - c. break into groups, each group identifies 2-3 questions they hope to have answers for by the end of the day
  
2. Review of survey results
  - a. Share infographic of results
  - b. On the easel is the list of concerns that were generated from the survey: are there any up here that are missing?
  - c. Once all concerns are listed, each library is issued three stickers and specifics of how to use the stickers to vote will be explained
  
3. Voting process to identify the issues concerning the most people
  - a. Participants will have 15 minutes to vote
  - b. Once the voting is complete, identify highest voted concerns
  
4. Review of the voting process
  
5. David Namiotka, Associate State Librarian for Library Services: share with member libraries what kind of timeline might be associated with an RFP process.
  
6. Team building discussion, break into groups
  - a. How can we communicate between the libraries and the SEO staff more effectively in the future?
  - b. 1: What can the SEO staff do to help facilitate good communication and feedback with the member libraries?
  - c. 2: What can member libraries do to help facilitate good communication and feedback to the SEO staff?
  
7. Final comments and announcements
  - a. Answer questions from our first activity of the day
  - b. The advisory group will review the information gathered at the meeting as well.

- c. The information will be shared with the rest of the members who could not attend.
- d. Director's forum will take place in May 2014 and will revisit some of these issues.
- e. Thanks to everyone for being here today!

8. Meeting adjourned

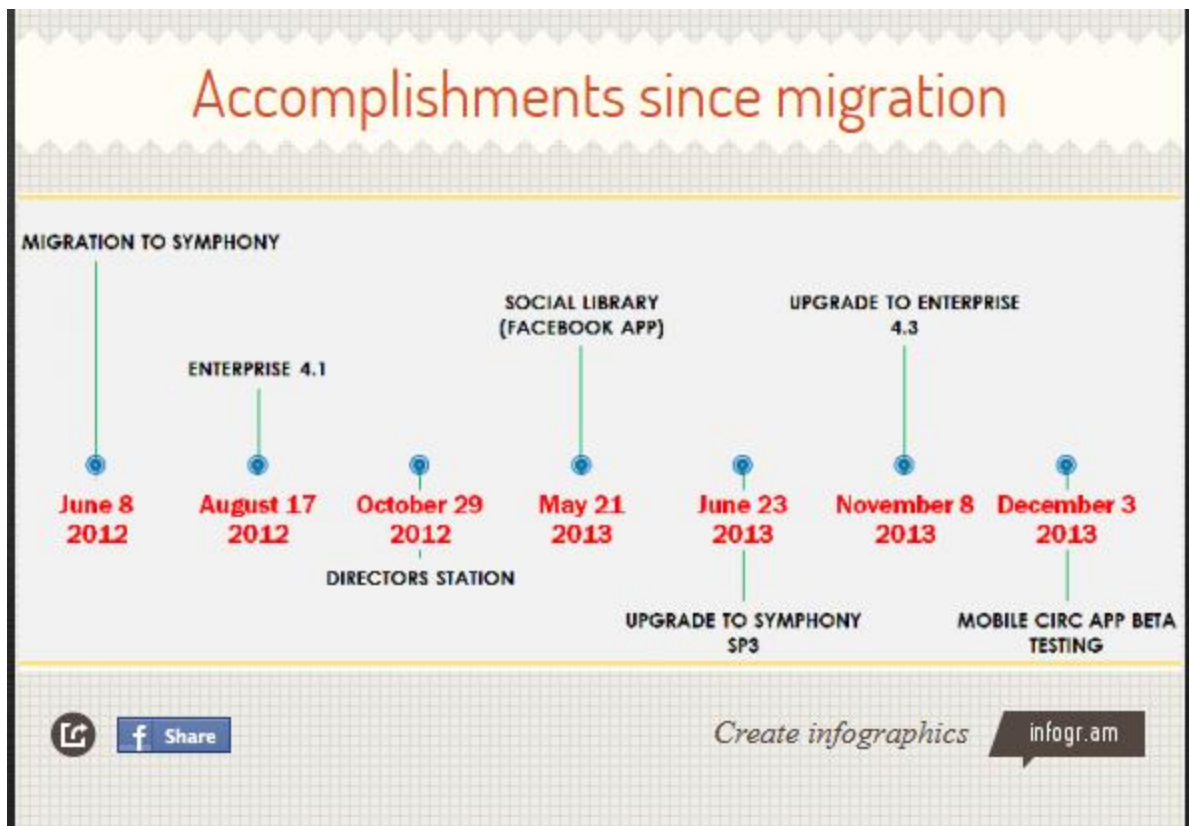


What is your overall satisfaction with the customer service provided by SEO staff?



Very Satisfied   Somewhat Satisfied   Neutral  
Somewhat Dissatisfied





### Positive Feedback about Enterprise:

Ease of use and look of Enterprise

Our patrons love the new catalog

Enterprise is very user friendly; we are teaching our 2<sup>nd</sup> graders to use it

Very happy about the public catalog

Access to eBooks from the catalog is easy to find

Love the jackets and reviews of titles

Enterprise has a more modern and attractive interface

Goodreads links are nice

Like the addition of the new item searches

Pleasing to look at and browse, is user friendly

Like the bestseller lists

Easy to place holds - fast delivery

The social features for the public catalog

General Keyword, like it-it searches all marc fields

Facets - limiting by format

My list functionality is more dependable

Convenient to use from home

**Positive Feedback about Symphony:**

Can see right away what a user has checked out and on hold

Having all user information displayed at checkout

Multiple functions within the checkout wizard

User registration works well

The option to have multiple tabs open simultaneously

Hotkeys for shortcut Fkey for functions

The right click options

Being able to track transit items

Placing requests on the on-order items

Discards being removed from the system

Morning reports running much faster, on shelf report is fast

Local staff client customizations

Local receipt adjustments

Trap holds wizard works great

Printing transit slips

The ability to link users

Outreach works well

Mostly happy with Symphony for day to day functions

Director's Station has been very helpful

Changing pickup location for a hold is easy

Detailed display is helpful for getting to information quickly

Serials module is clean and easy to use

Serials control records are easier to create

Setting up wizard properties for cataloging and ordering makes the process easier

Cataloging seems easier

The history of holds and payments/fines in the display user wizard is a big help

Duplicate checkout alert for Outreach users has been helpful

The renew item tab

Renewing users and items are helpful and fast

The ability to pull up a user for check out after checking in their items

Easier deletion of materials

The option to place another hold for this user

Using the label maker in Symphony cut down on processing time

Expired holds report works well

## APPENDIX C

### 2-3 questions each group would like answers to by the end of the day:

1. Can the search function be simplified and prioritized by location?
2. Can you lock individual location preferences and defaults into the library kiosk catalogs?
3. How much longer until we get what we want out of the system or otherwise receive recompense from SirsiDynix?
4. How much longer until the system is stable and functional?
5. How long can the SEO system afford to remain with SirsiDynix?
6. How can we make it more efficient in regards to staff time, etc.
7. Why are our circulation numbers affected by the migration?
8. When will purchase alerts be more functional?
9. How do we get SirsiDynix to listen to and respond to us?
10. What is SirsiDynix doing?
11. Are other consortia having these problems, and if so, what are our options?
12. Would the system work better if we consolidated policies and so forth to be more uniform?
13. Do we really want to move to another system and do this all over again?

## APPENDIX D

List of items voted on during Dec 9 meeting: (Symphony and Enterprise concerns) - total number of votes cast: 138 votes

- No trust in Workflows - 32 votes (23%)
- Not user friendly; searching, requests, series - 20 votes (14%)
- Search results are unreliable - 16 votes (11%)
- Usability; too much, too many -- 11 votes (7%)
- Purchase Report - 8 votes (6%)
- Holds functionality - 8 votes (6%)
- Serials; too many steps - 5 votes (3%)
- Blanket holds; not as expected - 4 votes (3%)
- Reports are difficult to run - 4 votes (3%)
- Magazine requests difficult - 4 votes (3%)
- System failure and errors (downtime) (Symphony) - 3 votes (2%)
- Down too often; slowness (Enterprise) - 3 votes (2%)
- Duplicate catalog records - 3 votes (2%)
- Search results not as expected (Enterprise) - 3 votes (2%)
- Printing; reports, lists, receipts - 2 votes (2%)
- Cataloging; too many steps to add items - 2 votes (2%)
- Not location-oriented: green checks on Enterprise - 2 votes (2%)
- Library items not grouped (Enterprise) - 2 votes (2%)
- Series searching is not good - 1 vote (1%)
- Cataloging; libraries aren't grouped/too many libraries; only want our own - 1 vote (1%)
- User search; library code not available - 1 vote (1%)
- Slowness with functions - 1 vote (1%)
- Comments; customer add instead of provided list - 1 vote (1%)
- PayPal not consistent - 1 vote (1%)
- Digital downloads not user-friendly
- My Account link
- My Account; cannot see transit for holds
- No item specific holds
- No mobile version
- Item group editor; lack of functionality
- Communication from SEO out to members
- Borrower group editor
- Family cards; group cards
- Outreach not as expected
- Item information hard to find

## APPENDIX E

### How can these concerns be remedied? What is it going to take to move forward? (Results of discussion)

- Staff need more training (mentioned more than once) - including 'short-cut work-arounds'.
- System was up and down again in the past few weeks, which makes for a lack of trust - *Dianna and SEO staff reported that this turned out to be an Oracle problem as opposed to a SirsiDynix issue*
- The staff would like to go an entire day without a 'random error message.'
- SirsiDynix needs to re-write the architecture of the system before all the issues will clear up - and it doesn't seem likely that re-writing the architecture will be something that SirsiDynix will consider.
- There are many little things that keep adding up - too many problems too often.
- Two weeks without having to submit a ticket would be an improvement.
- Purchase alerts need to be functional within the next 90 days.
- Get technical people who are motivated to identify specifics, and set deadlines for functionality.
- Have a definite time frame/deadline for issues to be resolved. When the deadline is passed, have a plan for the next step.
- We are talking about specifics and chasing small issues when we need to focus on the big picture. We need to define what we expect in functionality via an ILS. It could take 2 years to solve the larger systemic issues. What are the changes we would require, and set deadlines for those to take place.
- *After Dianna explained to the group that SEO hired an independent consultant who was an expert in SirsiDynix products to evaluate some of the problems taking place, someone asked if SEO felt the need to bring in a consultant to demonstrate to SirsiDynix the issues that were problematic, does that mean SEO staff doesn't trust SirsiDynix either?*
- There are two issues: what do we do about the future of the system, and what do we have to do to live with the existing system in place today to make it work in the meantime?
- Is the connection to SirsiDynix at all an emotional one, or was the main basis for the commitment to this ILS system a financial one? *Dianna and several former committee members from the evaluation team responded that the system was chosen based on the tremendous financial savings it provided to the SEO members.*
- *Dianna provided some information about the Blue Cloud product that SirsiDynix is now focusing the development money on - an attendee asked whether Blue Cloud was going to be able to fix everything?*
- I enjoyed the timeline from SirsiDynix during the migration - it would be beneficial to see SEO develop measurable goals and implement them.
- This is not going to get fixed - we are only being offered upgrades.
- We should be working toward looking at other systems and seeing where we should be in comparison.
- I want a product that works - there's too much confusion.

- One person asked the group: who is willing to pay for another system?
- We are competing against external forces like Netflix to be competitive.
- We are not finding anything in Enterprise that's so surprising—the catalog records are bad, but cataloging records are bad in general, anywhere.
- The ISBN is the first number the patrons see in the bibliographic record in the catalog—it needs to go away.
- The relevancy results in the catalog are not good—common titles do not rise to the top.

## APPENDIX F

### Results of communication discussion

**“What can the SEO staff do to help facilitate good communication and feedback with the member libraries?”**

- Service issues updates
- Regional trainers - can we continue to develop and use?
- Training - multiple methods
- Alert system - client push, text message. Major issues: phone calls.
- Use Advisory Group to open communication in their regional libraries
- SEO staff work the public library circulation and reference desks
- Less system jargon
- Skype
- Work with this group for the list of what we need in the ILS, size of library
- Searchable ticket archive
- Weekly eNewsletter on what SEO is working on - may be helpful for others
- Tech Contact list - SEO Tech listserv
- Push messages to the staff clients
- Let everyone see open tickets
- Discussion forums within members
- Global updates/feeds/time estimates

**“What can member libraries do to help facilitate good communication and feedback to the SEO staff?”**

- Have a local contact
- Routine Regional Directors' Forum
- Attend biennial users meetings
- Error reporting - check internally first, include what has been checked when reporting
- Should be reporting all issues
- Cataloging and policies should be more consistent
- List or forums to allow sharing, resolving problems and fixes
- Regional training
- Library responsibility in staff alerts
- Be consistent in supporting tickets
- Print screen shots of error messages