NICE Exploration
What can we teach each other
My background

25 years in Public Libraries

Migrated dozens of systems

Worked with structured data

I am not a cataloger
Let’s learn about you Zoom Whiteboard
We are more than coupon clippers
We add value... then we discount

We evaluate services
We simplify the complex
We expand what it means to be a library
Don’t UNDER think logistics

- Transportation can make or break a consortia
- Think about codes does an I (eye) look like an I (ell) on the label?
- Avoid partial reuse of codes “GRPL” looks like “GHPL”
- Space planning for sorting at member libraries
Plan for go-live

1. Don’t make things due during migration
2. Don’t make them DUE the 1st day AFTER go-live
3. Stop allowing new holds
4. Don’t make holds expire during migration
Working together as a team
Visualize the work
Start by visualizing what you’re **DOING today** not what needs done in the future
Decompose into smaller boards as needed

One board for system profiling
One board for data migration
One board for communication
Set limits

ONE in-progress item per person
Talk daily or at least weekly

- Frequent talks on in-progress work
- How do you move it forward?
- Occasionally talk about how to figure out what’s next
Working with stakeholders
Stakeholder Mapping Zoom Whiteboard
Do loan rules define your library?

Poll a few directors
Do they know their own loan rules?
Can you streamline and simplify?
Evolve existing structures

Don’t expect current groups to disband
They will continue either formally or informally
Appreciate them and find new ways to adapt them (combine, overlap)
Empower the boots on the ground folks

CLC used to run all decisions through library directors

As we grew, we moved lots of decision making to advisory committees

We are one library, one vote

Voting in a meeting isn’t always feasible due to low attendance we move voting online
Defaults and deadlines

Recommended course of action
Set a deadline for 3 weeks in the future
Provide clear/simple feedback options
Make the change on the deadline
How to communicate internally

Use existing tools
MailChimp/Google Groups

Gather as many email addresses as possible

3 X 3 Rule
   Repeat at least 3 times
   Via 3 mediums (email, meeting, minutes, phone calls, SMS, website)
Eliminate DMs or one-one-one chats

They are information silos
Instead, build channels around topic areas that everyone can see
Establish and **enforce** a tracking system

01. Require problems to be in a trackable system
02. Could be a ticketing system, a forum platform, bug tracker
03. It must be visible by the entire team
04. If people can’t use it directly, then someone must enter a ticket for them
If you don’t use it, why would anyone else?

You must be willing to “dogfood” the product
Report metrics to reinforce the value of the system
NICE Team Update

The NICE Team continues to engage in a comprehensive joint ILS consortium exploration project to determine value and feasibility of an ILS merger between the WVLS and Northern Waters Library Service (NWLS) ILS consortiums.

The report creation phase is focused on compiling gathered information into a report identifying benefits of a merged integrated library system, concerns and barriers, and conditions that make a merged ILS desirable. The NICE Team met with WiLS consultants in May to review and discuss an executive summary for the final report, and develop decision making principles for the next stage should system boards approve of the NICE project moving forward.

The Team also began discussing potential next steps and an order of priority for those steps.

More details will be shared on the NICE Libraries website when the reports are complete.
Make this 100 words long, at an 8th grade reading level and use bullet points “....”

ChatGPT
The NICE Team is actively exploring the possibility of merging the ILS consortia of WVLS and NWLS.

They are compiling information into a report that identifies the benefits, concerns, and conditions for a merged ILS.

In May, the team met with WiLS consultants to review an executive summary and discuss decision-making principles for the next stage.

They have also started discussing potential next steps and their order of priority.

Once complete, the NICE Libraries website will share more details about the project's findings and progress.
How do you communicate with patrons?
If you’re “being the scenes”

1. Write suggested text for libraries to use
2. Point patrons to a central source you can keep updated
3. Keep it SHORT!
The library isn’t the sun in most patron’s solar systems

Don’t expect that people will be checking your sites regularly
Include information in email footers, receipt, footers, etc.
Use newspaper/radio but WRITE the article for them
Is now the time to offer a marketing platform?

- Patron Point
- MailChimp
- ConstantContact
- MessageBee
Data Migration
Don’t assume migrating to the same system will be easy

We had a difficult Polaris-to-Polaris migration

At the time, it had only been done a handful of times

Everyone assumed there would be fewer decisions to make.

Instead, it had to be treated like a completely new system
Barcode Collisions

Look for Item and Patron barcode collisions NOW

Reduce patron collisions by deactivating old accounts

Inform libraries ASAP of allowed ranges to prevent future issues
Data Migration Matrix Zoom Whiteboard
Build your own data changelog

It can be something low friction like Slack channel or Teams thread

Include examples of problem records

A quick way to review data when going live
Test and Production Environments should be identical

Same Hardware (or VM)
Same OS Patch Level
Same database patch level
Same ILS version
## Test system throughput

<table>
<thead>
<tr>
<th>Get</th>
<th>Make</th>
<th>Include</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get stats on how many circ per hour, email notices each day</td>
<td>Make sure the system has been tested to those levels</td>
<td>Include performance SLAs into agreements</td>
</tr>
</tbody>
</table>
Test all aspects of holds

<table>
<thead>
<tr>
<th>Placing</th>
<th>Placing brand new one</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placing</td>
<td>Placing holds on title that has other holds</td>
</tr>
<tr>
<td>Fulfilling</td>
<td>Fulfilling holds</td>
</tr>
<tr>
<td>Canceling</td>
<td>Canceling holds</td>
</tr>
</tbody>
</table>
What to do about the valley between implementation and support?
Be prepared to repeat yourself

- Many times, implementation is kept out of the ticketing system.
- Set a deadline or milestone as to when the handover would happen.
- Ask for a handoff meeting between both teams.
Resources

MUCH better whiteboarding tool: https://miro.com/

Communication tools & templates: https://www.lumaworkplace.com/

Kanban workflow tool: https://kanbanize.com/

Trello Kanban template

Discourse Communication Platform Hosting

NOTSL Presentation

Book: The Art of Community
And What Else is on your mind?
What sticks out to you from today’s discussion?