

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



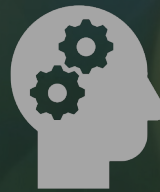
We are more than coupon clippers



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

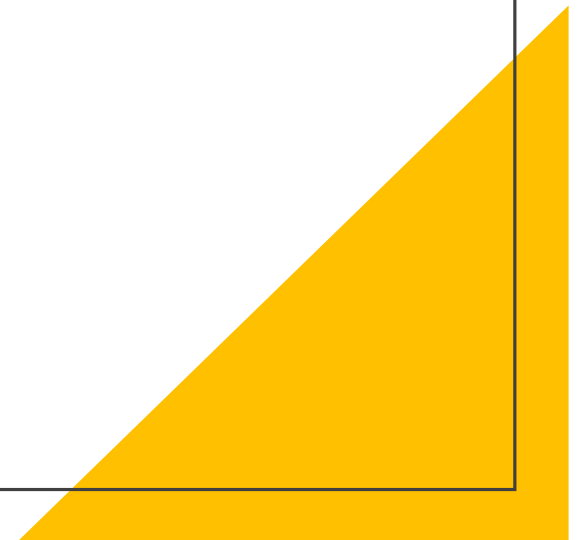
3

Stop allowing new holds

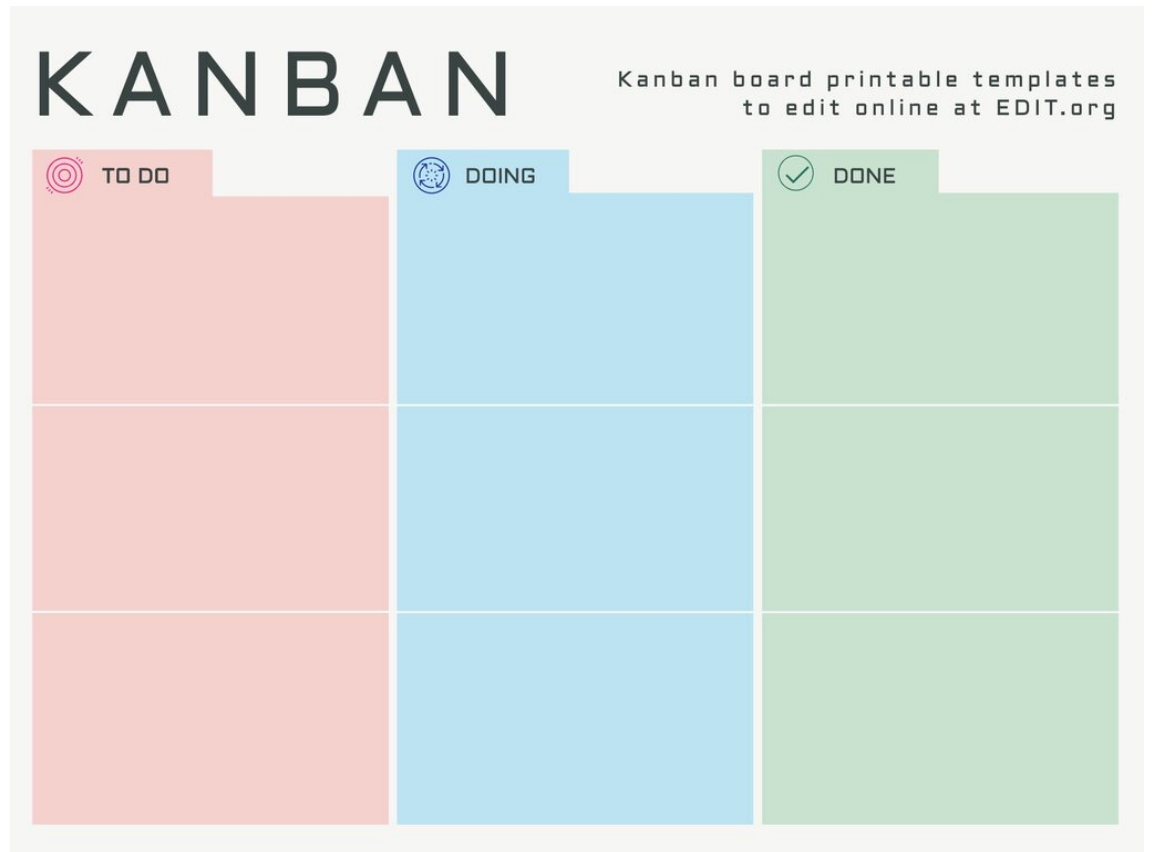
4

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

A photograph of a wooden surface with a red pin on the left and five yellow pins on the right. The background is a dark, gradient grey. The text 'Set limits' is centered over the pins, with a white horizontal line underneath it. Below the line, the text 'ONE in-progress item per person' is written.

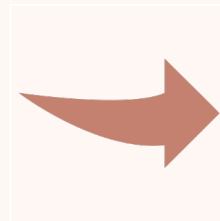
Set limits

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

A network diagram is shown on a white surface. It consists of several pushpins of different colors (blue, green, yellow, red) connected by thin brown strings. The strings form a web-like structure with various nodes and connections. The text "Working with stakeholders" is overlaid in the center of the image.

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

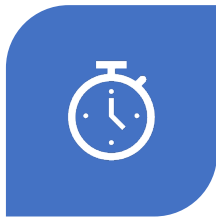
Voting in a meeting isn't always feasible due to low attendance we move voting online



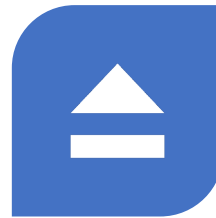
Defaults and deadlines



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



The background is a dark, blurred image of a digital dashboard. It features a line graph with several data points connected by a light-colored line. One data point is highlighted with a small orange circle. Below the graph, there are some faint, illegible numbers and text, possibly representing metrics or values. The overall aesthetic is modern and data-driven.

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

Nice Team Update

The NICE Team is actively exploring the possibility of merging the ILS consortiums 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!**

"If getting your message across matters to you, this is the way to do it."
—ARIANNA HUFFINGTON, founder & CEO, Thrive

Smart Brevity

THE
POWER
OF SAYING
MORE
WITH LESS

CO-
CREATORS
OF AXIOS &
POLITICO

Jim VandeHei, Mike Allen
and Roy Schwartz

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

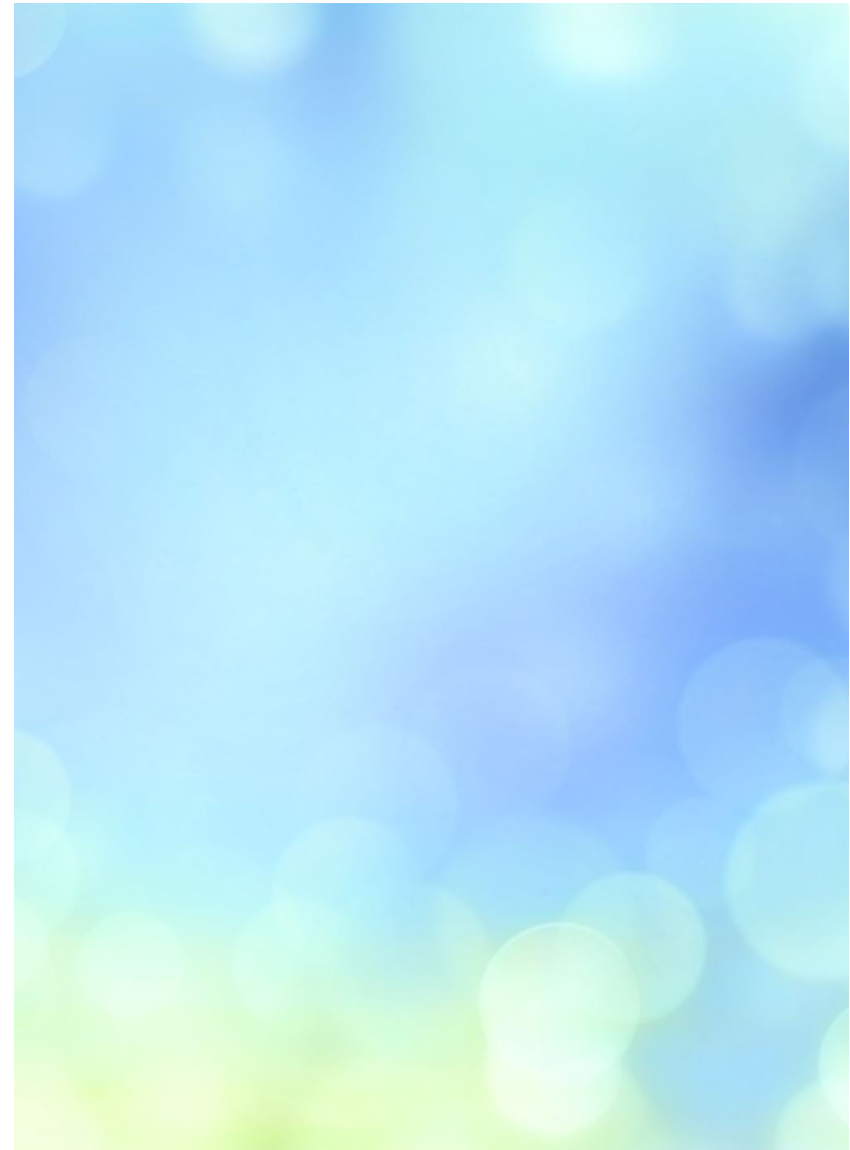
Is now the time to offer a marketing platform?

Patron Point

MailChimp

ConstantContact

MessageBee





Data Migration

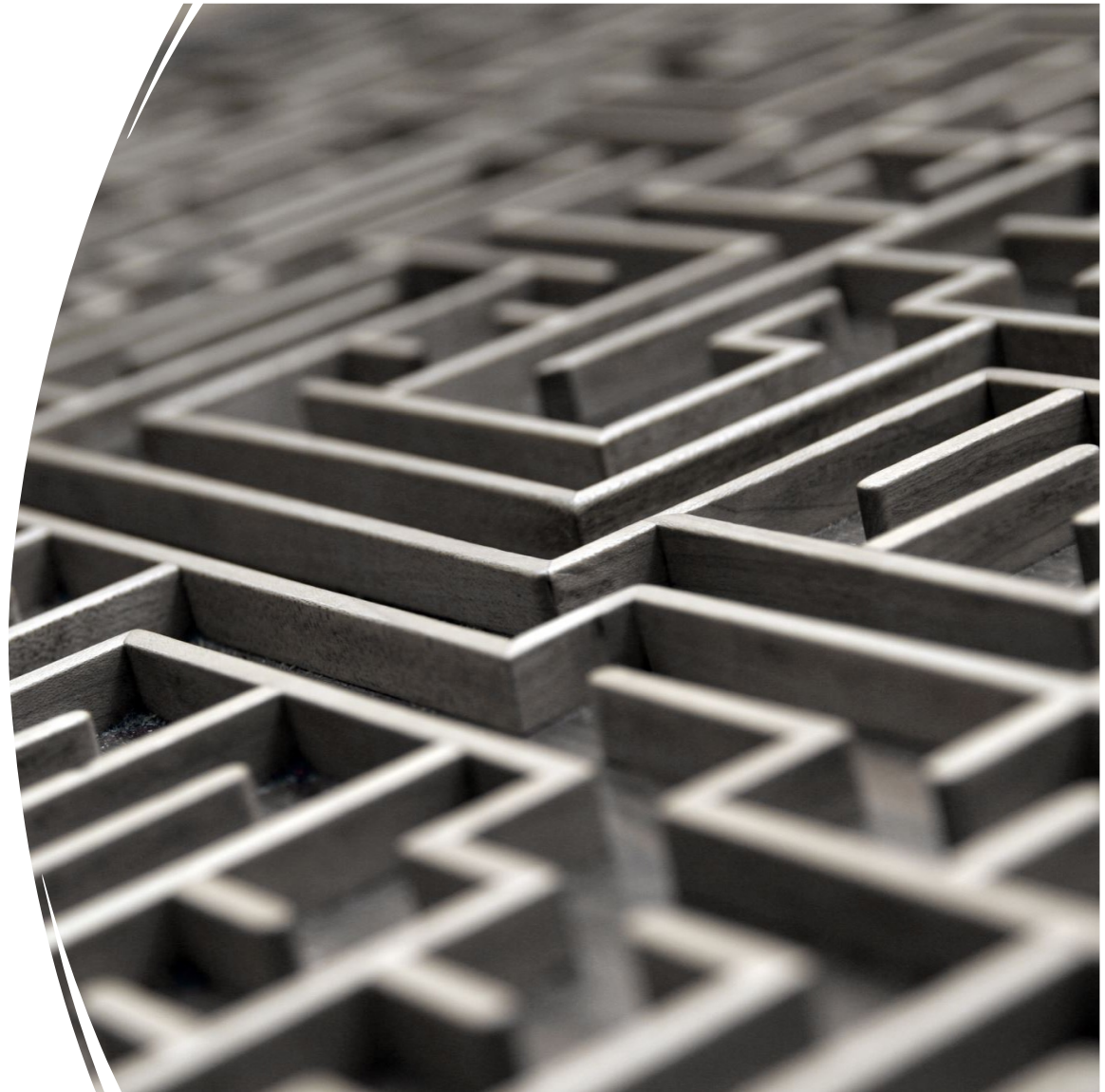
Don't assume migrating to the same system will be easy

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

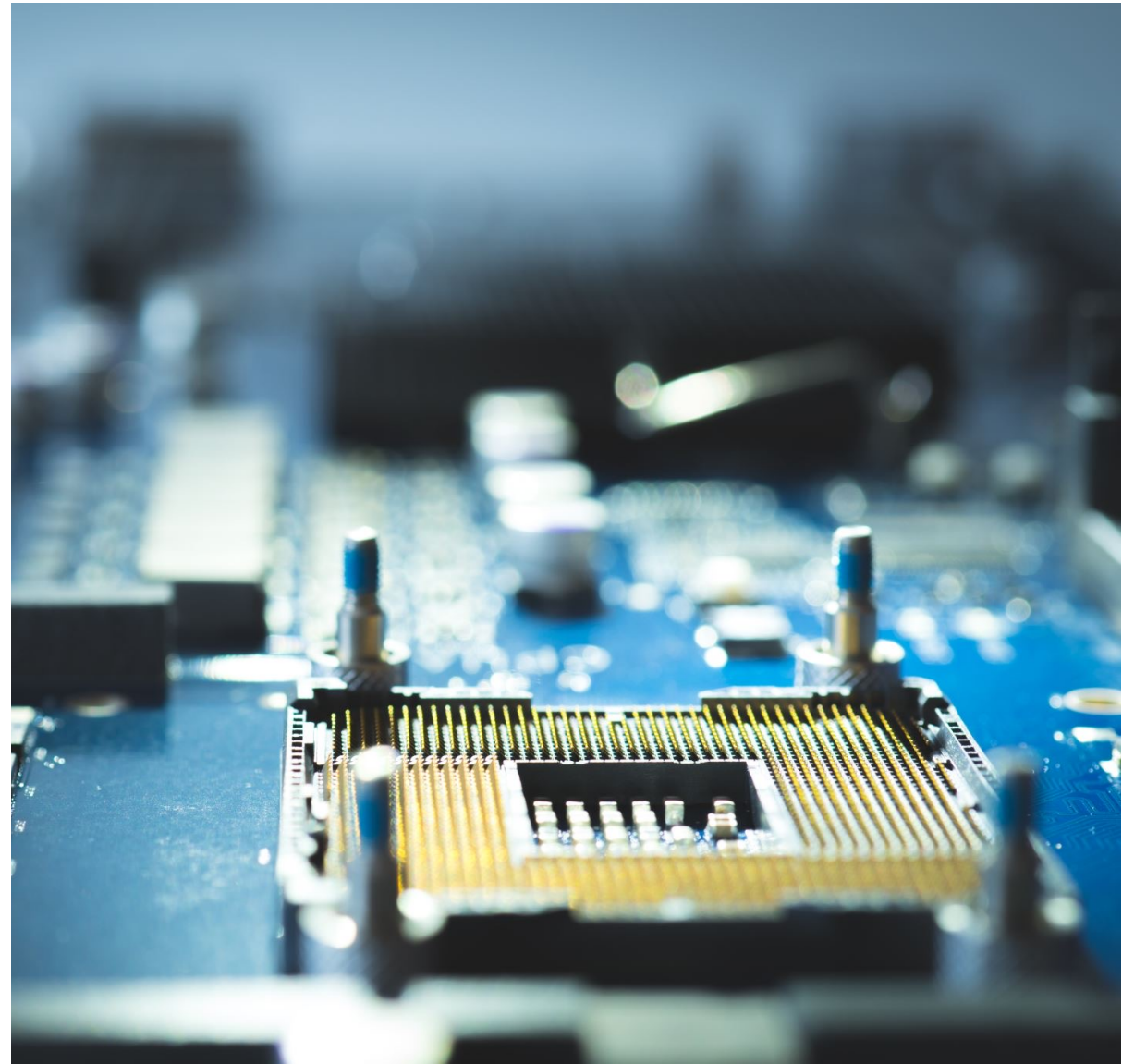
Test and Production
Environments
should be identical

Same Hardware (or VM)

Same OS Patch Level

Same database patch
level

Same ILS version



Test system throughput

Get	Make	Include
Get stats on how many circ per hour, email notices each day	Make sure the system has been tested to those levels	Include performance SLAs into agreements

Test all aspects of holds

Placing	Placing brand new one
Placing	Placing holds on title that has other holds
Fulfilling	Fulfilling holds
Canceling	Canceling holds

A scenic view of a mountain valley with a waterfall, overlaid with text. The image shows a deep valley with steep, rocky slopes covered in sparse, brownish-green vegetation. A small waterfall cascades down the center of the valley. The sky is overcast and grey. The text is centered in the middle of the image in a white, sans-serif font.

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?

