Library Improvement Grant
Final Project Report

Year Grant Awarded: 2011
Library/Organization: Valparaiso Public Library
Address: P.O. Box 440, 300 W. 2nd Street   **City:** Valparaiso, NE   **Zip:** 68065-0440
Project Name: Pioneer Koha ILS   **Project Number:** Grant Number 11.13
Grant Award Amount: $2,282.00

I.   **STATISTICAL DATA.** Give best estimates if actual numbers served are unavailable.
 A. Area served (check one):   State_____   Region_____   County_____
  City____X____
 B. 1. Targeted population to be served, per the application: <u>152 (patrons and staff at project start)</u>
  2. Total number of persons served by the project: <u>246 (current patrons and staff members)</u>

II. EXPENDITURES

A. Salaries & Benefits (All salaries paid from federal or local sources)		LSTA *(here, grant funding)*	Local/State Match *(here, all local sources)*
Position Title	F.T.E		
Director (80 hours)	2	$ 0.00	$ 800.00
TOTAL SALARIES		$ 0.00	$ 800.00
B. Contractual Services			
PTFS Liblime Koha (through Pioneer Consortium)		$2,282.00	$ 508.40
TOTAL CONTRACTUAL SERVICES		$2,282.00	$ 1,308.40
C. Library Material		$ 0.00	$ 0.00
D. Supplies$		$ 0.00	$ 0.00
E. Travel		$ 0.00	$ 0.00
F. Equipment		$ 0.00	$ 0.00
G. Other		$ 0.00	$ 0.00
TOTAL OTHER		$ 0.00	$ 0.00
H. TOTAL A-G		$2,282.00	$ 1,308.40

Submit amounts listed below along with this report.

I. UNEXPENDED LSTA FUNDS TO BE REFUNDED $ 0.00

III. Narrative
A. Project Activities
The Valparaiso Public Library applied to join the Pioneer Consortium on Jan. 1, 2011, and was accepted as a member on Jan. 28, 2011. The Valparaiso Library Director began attending monthly meetings immediately and was elected Secretary of the Consortium that April, re-elected Secretary in April 2012, and also now serves on the Technical Committee and its Training subcommittee and on the Public Relations Committee. The library "went live" on Pioneer's version of Liblime Koha on Oct. 25, 2011. This change was publicized through the Library's website, in the local school newspaper co-sponsored by the Library, by postings in the library, and in conversations with library patrons about the pending move from the Follet Destiny ILS to Pioneer Consortium's version of the Liblime Koha ILS.

In early 2011, the Director and Assistant Librarian completed an inventory of the collection and the Assistant Librarian inventoried the physical patron records and marked them for corrections needed. The inventory uncovered numerous errors in the Destiny Catalog records (items missing, items attached to incorrect MARC records, call number errors, barcode errors, missing call number fields, records for non-existent items, records for items that belonged to other Saunders County Libraries, and below standard MARC records, and so on) and showed a strong need for improvements in the library's call numbering system. Examination of the Destiny Patron records revealed many problems, as well.

The Library Director did the work necessary to prepare the Destiny records for the move to Pioneer Koha. **Preparing the patron records** involved (1) exporting the records with all their content into a comma-delimited text file, (2) editing the text file so that it could be imported into Excel, (3) importing the file into Excel, (4) editing and updating the content of the Excel file for accuracy and then to match the requirements of Koha by establishing appropriate patron categories, (5) exporting the file as a tab-delimited text file acceptable for import into Koha. *This work gave us up-to-date, accurate patron records, prompted the development and implementation of a new and improved Patron Application Form, and help us improve our procedures for dealing with annual renewals.*

Preparing the MARC records was much more problematic. Follet provided no technical support and allowed for no efficient way to edit MARC records. Liblime Koha staff advised using the MARC editor available from Oregon State University, MarcEdit. This task involved exporting the MARC records from Destiny in several formats until finding one that MarcEdit would accept, and then editing the records one at a time within that program.

The Director developed a call numbering system which uses the first "word" of the call number to designate Koha Item Type, Collection Code, and Location Designation. **The Director then edited the approximately 8,540 MARC** records to reflect that system; edited other errors in the fields that contained information about attached Items; and deleted records for non-existent items. (Since Liblime was to import all Item information but only MARC Records not already in the system, the Director did not edit other portions of the MARC records.) Exporting the file from MarcEdit into the MARC21 format which Liblime Koha needed also posed challenges, which Liblime staff helped solve. *This work gave us up-to-date, accurate Item records and lead to a call numbering system which is very helpful to patrons, staff members, and volunteers who help shelve items.*

Creating transferable fines records and checkout records required a process similar to that used to produce the patron records, complicated by the fact that Destiny would produce only html files or pdf files for some reports, and only comma-delimited reports for others. The data from these reports had to be combined into one file. Moreover, the final Excel file required serious editing for call numbers and barcodes, using the edited MARC records as a reference from OUTSIDE Destiny. *This work made us even more aware of the information about overdues, fines, and holds to which we need easy, regular access – and which Koha actually provides!*

The next stage of the process – **mapping** – involved completing Liblime/Koha's numerous spreadsheets. These spreadsheets mapped the transferring records to the Koha system; established patron categories and fees and checkout rules; and established item circulation rules (checkout periods, renewals, fines basis, fines maximums). All the preliminary work editing the MARC records paid off at this point, because it greatly simplified the mapping process AND made the Koha Item, Collection, and Location tags actually meaningful and useful – and accurate. The preliminary work with the patron records paid off in similar fashion.

There also were **various online forms** to complete to set the library's open/closed dates, create templates for emails to patrons, set up formats for varieties of reports, and set permissions for each staff member. Once these were ready, Liblime/Koha staff uploaded the library records to the "sandbox" for testing. The Director and Liblime/Koha staff spent **several weeks in testing** and discovered a number of problems in that process, which Liblime/Koha staff corrected fairly easily.

Meanwhile, **while teaching herself to use Pioneer Koha for daily operations, the Director developed training materials** for Valparaiso Library staff, editing and updating daily operations documentation Lincoln Library staff had shared and creating new documents, tailored for the Valparaiso Library. The Director then trained the Assistant Librarian and Emergency Staff member to use Pioneer Koha.

Liblime/Koha staff then "loaded" Valparaiso's records **onto "production"** (the real system) and the **Director recreated** the calendar, email templates, permissions, patron categories, and item and circulation rules there and retested. Valparaiso Public Library **"went live"** on Pioneer Koha on October 25, 2011.

B. Project Evaluation
1. Methods
To evaluate the move to Koha from our patrons' point of view, we have relied primarily on personal interviews and conversations and secondarily on reports Koha produces (primarily Holds and Due notices; also, renewals we can tell that patrons made online). Our patrons are reluctant to complete written surveys and we do not have the staff to conduct surveys by phone, but we routinely talk with our patrons during their visits to the library and we record their comments on our Daily Statistics sheets. We also have received emails and calls from patrons of other Pioneer Koha libraries, asking about Interlibrary Loan possibilities.

To evaluate Koha from staff members' perspectives, the Director and other staff members have kept track of problems and potentials for improvement by noting them on the Daily Statistics sheets. We have noted improvements over the old ILS during training sessions, staff meetings, and daily use.

2. Results
For Patrons
The Koha ILS lets us provide much improved public access to the catalog and to functions library users are coming to expect – improved searches, online renewals and reserves, online access to their record of fines, space to save reading lists, and so on. It also provides access to many more resources, from various sources of reviews, to other Consortium members' holdings. It has improved our ability to provide Interlibrary Loans.

At time of transfer, we had 152 patrons. That number has grown to 244. Of these, 110 do not have email or home access to a computer at home or work. Another 50 have access to email only on their cell phones. It therefore is not surprising that many of our patrons do not go online to visit the library. However, far fewer patrons used the Destiny OPAC – and we received many complaints from those who tried to use it, since it allowed them only to search for items in the collection.

Since going online with Pioneer Koha, we have received online requests for Holds, and patrons have renewed items online. Patrons also have reported using and liking the new OPAC's many features, such as the ability to create and use various lists. They also like being able to search for items in other Pioneer Koha libraries' collections because they can then either ask us for Interlibrary Loans or recommend items for us to purchase. Some of our patrons also have asked us to save their checkout history for them; all our patrons appreciate having the choice to keep that information or not. They also like the fact that the system provides information about the items and links to reviews on Amazon and, more recently, information about items included in series.

Patrons who have e-mail report that they appreciate the Advance Notices of Items Due. Those without email like receiving phone calls from us about items due or past due. The new system makes it possible for us to provide ALL our patrons with this service, either by email or personal phone call. They also like the fact that we can now print lists of items they have checked out.

Several patrons complained about the "digest" email because it did not list individual items due or coming due. The digests now have been changed so that they do list individual items. Patrons also report being confused by the advance notices coming from Lincoln Library Systems; development is in process to enable all System email to come from the patron's own library instead of only from LCL.

Those who use computers regularly tell us they have no trouble using the OPAC. Those who do not use computers comfortably like the fact that we can look up much more information for them when they are in the library.

For staff
The Director and other staff members greatly appreciate the change.

These improvements occurred during the process of moving from Destiny to Koha:
- Up-to-date, accurate Patron records
- A new and improved Patron Application Form
- Improved procedures for annual renewals
- Up-to-date, accurate MARC and ITEM records
- A call numbering system which helps patrons, staff members, and volunteers who shelve items.
- Increased awareness of the information about overdues, fines, and holds to which we need easy, regular access.

We have experienced almost no down time since migration. At first, but less and less as time goes on, items we thought were in the system would not be, but these problems could have resulted either from glitches during migration or from bad or missing MARC records in Destiny. Periodically, Koha does not cooperate with the browser, but this happens far less than it did with Destiny. There also are occasional other glitches, such as the system not being able to find an Item by its barcode, even though the Item record includes the correct barcode. However, PTFS/Liblime Koha technical staff respond quickly to requests for help, which was not true for Destiny.

We see much improvement in terms of access to data about holds and overdues. Koha produces daily reports which make holds and overdues easy to track; this has let us easily improve our services to patrons and our collection of overdue fines. We also see much improvement in how records are kept for damages and losses and how we collect fines for such. In addition, staff members have noticed that patrons are less likely to lose items and more likely to return them on time because Koha helps us enforce policies such as limiting the number of renewals allowed, which Destiny did not.

Koha lets us link the accounts of members of a household to a single responsible party. As a result, we can charge annual fees by household AND keep records for each individual. The system alerts us when the annual fees are due.

Koha has greatly improved our ability to produce reports, which was one of Destiny's big failings. We have access to all of the Koha ILS tables – and a report which shows the structure of those tables, and another report which lists all the tables – and, with some effort, can set up all of the reports we need. We are in the process of doing that, so that it will be easy to produce the information we need for annual reports to NLC and to the Village.

C. Project improvements
During our migration to Koha and in this first year of its use, we have been able to report our evaluations of its strengths and possibilities for improvement to all the members of the Consortium. The Technical Committee has taken our comments and requests seriously and, because Koha is an Open System ILS, and because of the nature of the Consortium's relationship to PTFS/Liblime Koha, system development (upgrading) is ongoing and meets the Consortium members' specific wants and needs. In addition, PTFS/Liblime Koha technical staff respond quickly to requests to attend to performance issue or fix small "bugs." Destiny offered none of these advantages

We greatly appreciate both the quick fixes of performance problems and being able to ask for bigger system improvements – and actually get them. For example, a recent improvement shows the series sequence information about items in the collection; another has improved the SEARCH function. We are suggesting a change which will give us a count of visits to the OPAC.

D. Ongoing project support
Our migration to Koha has decreased our ILS costs so significantly that ongoing support for it is not in doubt. The annual fee for us, even with increases for inflation, will keep saving us money in comparison to fees charged by a for-profit ILS. Moreover, the relationships the Consortium creates for us with member libraries and other Koha libraries offer support that money alone cannot buy.

E. Collaboration with Consortium Members
Long-term collaboration with the other members of the Consortium offers many benefits. We are a small library with a small staff, but we now have technical help from experts at other Pioneer Koha libraries, not only in using Koha but in developing policies and procedures and services and in planning for more and better ways to share resources and information. The network is gradually growing to include other PTFS/Liblime Koha libraries and the entire Koha community. Immediate possibilities include reduced OCLC costs and cooperation with the Denver Koha system for significantly reduced costs for access to an extensive digital library (similar to Overdrive).

F. Attachments
Pioneer Invoices to Valparaiso Public Library for PTFS/Liblime Koha contractual services:
- 3/22/11 – Orientation, $250
- 8/16/11 – Migration, $1,657.50
- 12/29/11 – Migration balance, $482.90
- 5/10/11 – Annual Maintenance, $400.00
  - Total: $2790.40

Pioneer Treasurer's reports of Valparaiso Public Library payments:
- 1/1/12 $2390.40
- 6/1/12 $ 400.00
  - Total: $2790.40

IV. Certification

I certify that all of the information contained herein is correct to the best of my knowledge.

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Signature of Library Director   Date: <u>Sept. 4, 2012</u>
Typed Name of Library Director: <u>Maria M. Cadwallader, Ph.D.</u>

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Signature of Fiscal Officer   Date: <u>Sept. 4, 2012</u>
Typed Name of Fiscal Officer: <u>Floyd Maresh</u>