

# Recommending a new system

## Exploring options and reporting recommendations

by Marleen Cloutier and Sylvia Orner

### INTRODUCTION

The Integrated Library System (ILS) is often the invisible backbone supporting library infrastructure. When it works well, it should seamlessly integrate workflows across departments. However, when it is no longer meeting the institution's needs, it may be time for a reevaluation. In the Fall of 2022, the Dean of the Weinberg Memorial Library of the University of Scranton tasked Library Faculty with creating a committee to explore and evaluate options for a new ILS and discovery layer.

At the Weinberg Memorial Library, we found that our current ILS and discovery layer were no longer meeting the demands of our faculty, staff, and students. With the aging technology infrastructure, we were noticing increasing security and compatibility issues. We were also incurring substantial costs for ILS and discovery maintenance as well as for additional software and services to adequately address needs that could not be met by the ILS alone, such as electronic resource management (ERM).

### RESEARCH

Because the ILS is an integral part of day-to-day work life for so many of our library departments, it was important for the exploratory committee to have representation from across the entire library, including technical services, circulation, acquisitions, research and instruction, library systems, and digital services. Broad representation allowed for additional insights into what our current system was doing well and what improvements were needed.

To start, we conducted a needs assessment for each department, giving representatives from those departments a chance to discuss with their colleagues what they liked and disliked about the current system, what positive and negative experiences they have had with our current service and support models, what added functionality would they like to see in a new system, and what improvements they envisioned for student and staff experiences.

Next, the exploratory committee researched which ILS/discovery products similarly-sized institutions were using. We chatted with colleagues at conferences and other events about their systems, what they liked about them, and what they did not. We also consulted the most recent edition of Marshall Breeding's Library Systems Report, which always offers valuable insight into the current state of library systems.

Based on the initial findings, we decided to look into four systems. Before communicating with the vendors, we worked with our Dean of the Library to establish a tentative timeline based on our current ILS contract. While communicating with potential ILS vendors, we needed to be transparent with them about our process and our timeline. Since the committee's charge was exploratory

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*Marleen Cloutier is the Cataloging and Metadata Librarian at the Weinberg Memorial Library, University of Scranton. Sylvia Orner is the Collections and Resource Management Librarian at the Weinberg Memorial Library, University of Scranton.*

in nature, we did not want to create any expectations or misunderstandings. Vendors were invited to give a brief 1 ½ - 2-hour demonstration of their product, and the committee was invited to voice any questions or concerns.

#### Evaluation and Recommendations

After the vendor demonstrations, the committee met to discuss our vendor meetings. Recognizing that more than two hours were needed to explore the full depth and breadth of an ILS, we also relied on our previous research and conversations with other librarians. Following the discussion, an anonymous survey was distributed to all committee members, asking them to select the ILS that they felt would best fulfill the needs of the library as a whole and to identify whether or not a different ILS would better fulfill the needs of their specific department. The same questions were asked about discovery layers. Committee members were also given the option to express any last thoughts or concerns.

When the results were compiled, it was clear that there were two ILS/discovery pairings that would best meet our needs. The additional comments provided also helped shape the framework for our final report and recommendations.

#### Reporting Recommendations

Our committee was tasked with providing recommendations to our Dean of the Library in the form of a report, with the understanding that this document would be utilized to select a new system, shared with Faculty Librarians & Library Staff, and ultimately brought to Administration and University IT with a request for support and assistance with funding.

It was essential to consider the needs of the reader and be cautious about using technical language and acronyms, especially if the readers of the report were not familiar with library and technical terminology. Knowing this would be seen by administrators outside of the library, we identified acronyms early in the report and added definitions for technical terms to promote clarity. To provide a baseline for comparison, we also outlined our current system and other product integrations before describing the recommended systems.

It is critical to know your audience and what the report will be used for after its submission. The report needed to impart how this new system would improve the library experience and impact students, faculty, and staff. We also knew we needed to speak to the library's mission as well as our Jesuit university's mission, and communicate how making this change could help us meet them.

Students and faculty expect that the library will be able to place information in their hands instantaneously. They also expect the Library to provide efficient and practical tools to access online resources and digital materials. To solidify those expectations and support our need for change, we identified and utilized requests for change from a recent survey of students and faculty outside the library. As members of the Association of Jesuit Colleges and Universities (AJCU), we included comparison data to other AJCU schools and to peer and regional competitors to give the audience a snapshot of which library systems were being used at other institutions.

The latter part of the report shared summaries of the needs assessment research, a synopsis of the demonstrations for various systems the committee reviewed, and the committee's final recommendations, which outlined why the committee felt the particular ILS/discovery layer met our needs and shared any concerns. We included appendices to allow for a deeper dive into our research and provided links to additional product information so we would not burden the audience with reviewing all the data and information collected.

### **FURTHER DISCUSSIONS WITH LIBRARY ADMINISTRATION**

One thing we did not include directly in the report, but did provide our Dean of the Library, was the estimated costs of the systems and costs associated with implementation. While costs no doubt play a role in the final selection of the system, there was a desire to not select a system based on cost alone but to look at our needs first.

When sharing the estimated costs, we also shared savings where we could reduce redundancy and cost by discontinuing existing programs or services. We utilized internal research in the report, identifying integrations with other software and services. We also considered the possibility of efficiencies as we looked at various systems. Reducing costs by removing software and services that we would no longer need or justifying the additional cost of selecting a particular system because it performs a function better can be a selling point.

### **CONCLUSION**

The report was delivered to the Dean of the Library on May 2, 2022, and shared with the Faculty Librarians on May 5, 2022. The report successfully conveyed our recommendations and was well received. A new system was selected in early December 2022, and we are now on our way to implementing a new discovery layer in 2023 and a new ILS in 2024. While the ultimate decision-making was in the hands of administration, the report served to guide, inform, and ensure that the final selection would meet the needs of the library, students, faculty, and staff.