Core Catalog Management Interest Group

ALA Core Virtual Interest Group Week - February 3, 2021

Elizabeth Miraglia & Jianying Shou (Co-Chairs)
Lauren Geiger & Peggy Griesinger (co-vice chairs)

Presentations:

- "Keep calm and migrate on: Getting Buy In for Consortial Changes During a Migration" presented by Jennifer M. Eustis, Metadata Librarian, University of Massachusetts Amherst
- "OCLC Data Sync Reports with Python" presented by Colin Bitter, Head of Cataloging and Metadata, R. Barbara Gitenstein Library, The College of New Jersey
- "Public Notes to the Rescue! Connecting Resources, Services, and Practices in the Library Catalog" presented by Rebecca Hunnicutt, Collections Management Librarian, and Jeffrey M. Mortimore, Discovery Services Librarian, Georgia Southern University

- Q&A

Keep Calm & Migrate On

Getting BUy in for consortial changes during a migration

Topics today:

- Quick background to Five College Consortia (5C or FC) Migration
- the five stages and reactions to the migration
- Communication channels in the fc
- Grassroots solution: the open house & Getting Buy in to changes

Amherst College
Hampshire college
Mt. Holyoke College
Smith college
University of Massachusetts amherst

"

IPSWICH, Mass. — June 5, 2018 — EBSCO Information Services (EBSCO) and the Five Colleges Consortium have agreed to an EBSCO FOLIO Beta Partnership. The consortium includes Amherst College, Hampshire College, Mount Holyoke College, Smith College and the University of Massachusetts Amherst. These institutions will leverage the FOLIO Library Services Platform in a variety of institutional scenarios.

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EBSCO Press Release from June 5, 2018

https://www.ebsco.com/news-center/press-releases/ebsco-information-services-and-five-colleges-consortium-announce-ebsco

OH NO!DID OUR LIBRARY JUST DECIDE TO MIGRATE!

1.

Five stages

Confusion, Repudiation, Grief, Bargaining, Acceptance

Why do we need a new library platform?

- What we have now works
- The platform hasn't reached its end of life
- Does it make sense to move to open source?
- Did we consider all the options before making this decision?

Will this be like the last migration?

- We weren't consulted last time.
- We didn't know who made decisions and why.
- No one listened to what we needed to do our jobs.
- We had to think creatively once we migrated to get our jobs done.

How will we do our work in the new system?

- Will our workflows change?
- Has development finished on our requirements?
- What about my job?
- What about my workflows? Can this new system do what we need?

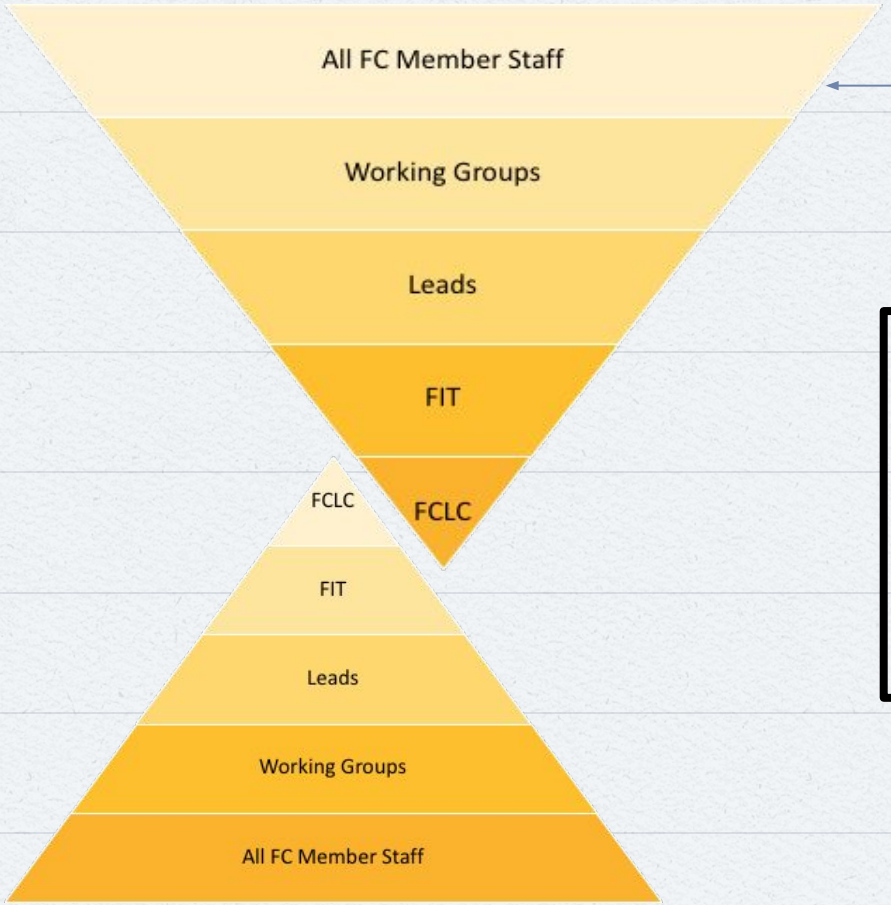
2.

How can you keep calm & migrate on?

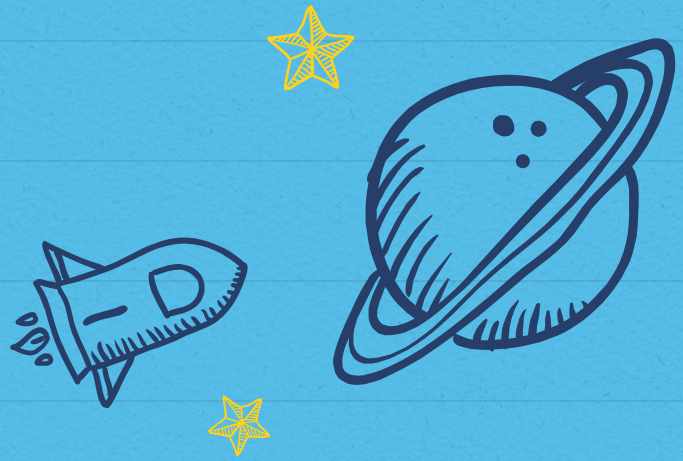
Stages of Technology adoption are present all at once

What are dreams made of? How to strive for adoption?

- How and when can these issues and questions be addressed?
- Who should be involved?
- Is there a process? What does it look like?



High level view of the feedback cycles and decision making cycles presented by the migration/implementation team to Five Colleges staff.



Open House

The keystone between higher level decision makers and staff on the ground

Open houses 1.0

Discussions

Initially the purpose of the open houses was to bring diverse staff together to get their input on their needs for a merge project, and to address their questions as best possible. Discussions were guided by topics such as: should all bibliographic records be merged?

Recommendations

These guided discussions took place around such topics below to develop a set of recommendations for the merge.

- Special collections
- Archives
- Serials
- Analytics/Bound withs
- Rental Collections
- Batch loads
- Special formats (music, a/v, micro, etc.)

Review

The Recommendations were reviewed multiple times by the community. Open Houses were held to discuss the recommendations and answer questions from the community. These recommendations were also reviewed by the Implementation team and then approved by the Five Colleges Executive Board.

The open houses 2.0

Decision making

Decisions are drafted by the working group in terms of:

- How to align bibliographic practices
- Collections/Bibliographic records to merge
- How to merge records

Review & comment

Once a set of decisions are formulated, an Open House is scheduled. Open Houses include updates from the working group followed by each decision presented for comment & review by the community.

outcomes

Decisions are then either acted on or go back to the working group to be reformulated. If being reformulated, these decisions will be presented in an upcoming Open House.

The goals of the open houses

Grassroots Input

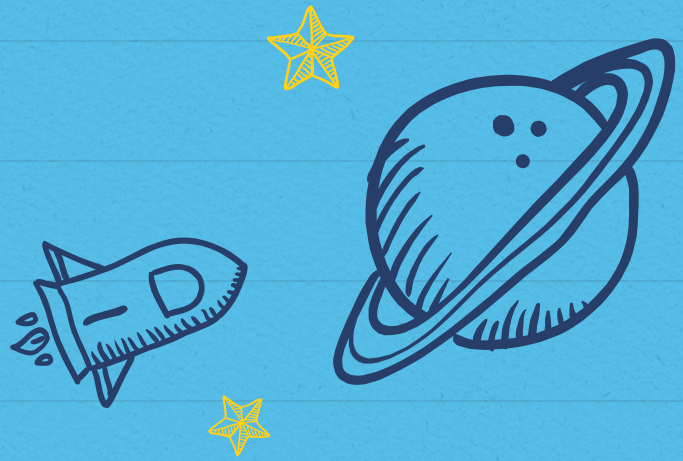
Open Houses exist to make sure staff are heard and their ideas are incorporated.

Flow of Information

These ideas are shared with our Implementation Liaison and our FOLIO project lead who share these with the Implementation Team and college Directors.

Transparency

Open Houses are recorded. All working group meetings are records and meeting notes are available to the public. Slack, email, and implementation blog are used to communicate.



Does this create buy in?

Are Open Houses really the keystone to acceptance of our merge and eventual migration to FOLIO?

Open houses contribute to transparency, trust, and acceptance and counteracting . . .

Confusion

Open Houses are a chance for people to get clarification and have questions answered.

Anger

Open Houses are a chance for the Implementation Team and members of administration to hear from staff.

Repudiation

Open Houses are a chance to reaffirm the merge and migration and display rumours.

Depression

Open Houses are a chance for staff to come together, to support each other, and to listen to each other.

Fear

Open Houses are a chance to highlight the great work of staff and how valuable their work and input are.

Denial

Open Houses are a chance to hear from members of the Implementation team on merge and migration specifics.

It's a continual process

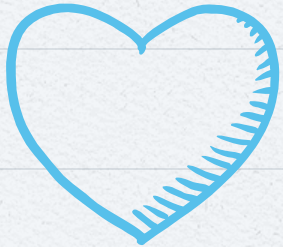
How Open Houses are run are continually being developed. The good news is that people now ask when the next Open House is!

Credits

1. McCracken, Grant (2013). The five stages of disruption denial. *Harvard Business Review*. Retrieved from https://hbr.org/2013/04/disruption-denial.
2. Kubler-Ross, E. (1969). *On death and dying.* Macmillan.
3. Christensen, C. M. (2000). *The innovator's dilemma: the revolutionary national bestseller than changed the way we do business*. HarperBusiness.

Image Credits

1. Cool, Tim. *End of the world*. https://www.flickr.com/photos/95742656@N00/28568008987. CCO 1.0
2. Djandyw.com. *The five stages of grief*. https://www.flickr.com/photos/djandywdotcom/30666701963. CC BY-SA 2.0
3. Smith, Michael. *99 Cent Dreams*. https://www.flickr.com/photos/mbransons/5735203821. CC-BY-2.0
4. Dance, Felix. *Long, windy road from Lape to Palampang*. https://www.flickr.com/photos/felixdance/25930533995. CC BY-2.0



THANKS!

Any questions?

Jennifer Eustis, jeustis@umass.edu