

FY'14 I-Share Systems Committee White Paper

The CARLI I-Share Systems Committee took this past year to work on developing a broad survey, which will hopefully capture the current state of interoperability between Ex Libris Voyager and other platforms/software applications on campus. The survey might also give an indication of impending I-Share initiatives and system trends. Through identifying sections to include in the survey (e.g., billing, authentication, and patron/campus/Voyager interactions), developing succinct questions, and discussions of next steps to take, the committee has created a prototype survey that is ready for implementation in FY '15. The survey is the first assessment undertaken by a CARLI standing committee. This was an involved process and the committee members now have a new appreciation of the difficulty of this task. However, the importance of a comprehensive survey that provides useful insight into how member libraries interact with Voyager was increasingly emphasized throughout this process.

Development of the survey was an organic process for the committee. C. Koteles proposed the original idea of a survey. A small group of committee members (C. Koteles, K. Pettitt, E. List, J. LeFager and K. Hess) worked on the initial sections and questions for the survey. As the survey grew in scope, the whole committee became involved generating questions for additional sections. During its January and February 2014 conference calls and through a Google Drive document, the group refined the sections and the questions. In March, the committee decided to run a pilot of the prototype survey to assess the questions (e.g., precision of language, identify expected or unexpected responses and the time required for completion. Members of the committee served as the test group. The group evaluated responses and shared their experiences as users, which helped identify repetitive questions, develop a set standard, repeatable questions to close out each section, and further refine the questions. With the sections and questions solidified, the committee began discussing the format of the survey.

The layout and structure of the survey will need to balance the notion of an unified survey while creating sections that allow the CARLI I-Share liaisons to distribute sections of the survey to others in her/his library for completion. Arranging the survey into modular sections acknowledges how libraries are organized and allows for multiple staff members to participate in responding to the survey. This structure will also make it easier to sort through the collected data, so CARLI staff and I-Share committee members can readily analyze the results. Experience from the pilot exposed issues related to question type (single vs. multiple answers), format of questions (alpha arrangement of answers vs. matrix of questions/answers) and those that require a more exhaustive list of answer options. At the end of this year, the committee began identifying questions that needed examples to help the respondent answering questions. The committee appreciates the willingness of the CARLI staff to convert the survey into a SurveyMonkey format when the committee is ready for that step.

Once the survey finalized and distributed to all I-Share libraries, it will provide CARLI staff and member libraries with a snapshot of the many interrelated software applications I-Share libraries integrate with Voyager. It will also identify processes that I-Share libraries have developed to ensure that Voyager and other software applications work together as efficiently as possible to achieve tasks such as patron batch loading, fines and billing and interlibrary loan. The survey may also provide insight into the types of functionality and features I-Share libraries would want in the next ILS system. Routinely administering the survey over time will assist CARLI in prioritization of projects as well as highlighting future platform/software RFPs as the gathered data will track initiatives/trends. Arranging the gathered data into a resource directory is another benefit of the survey. This directory would connect libraries looking for product assessments, training assistance or answers to other technology questions from member libraries already using a product.

The committee has learned much from the development and pilot of the survey. By far the most important lesson learned involves the complexity of designing questions with specificity of wording to reduce ambiguity while allowing--but not leading--people to answer questions in a pre-determined manner. Also, determining a realistic timeframe to allow for adequate development of the survey, testing and roll out was underestimated. In light of these learning experiences, the committee suggests the following recommendations for next year's I-Share committee:

1. Review and refine the timeframe the FY'14 I-Share group has suggested (see Table 1). Timing is everything and given the size of the survey and the number of possible respondents (82 I-Share libraries), the committee recommends working back from a selected launch date and setting milestones to help keep the project on track.
2. A beta test of survey in its SurveyMonkey format should be done to identify further tweaking of the questions or format before the initial launch of the survey.
3. The FY'15 I-Share committee should give thorough consideration and discussion to the administrative mechanics of the survey and proper handling of the gathered data. Discussion needs to occur on the following topics:
 - a. Frequencies of survey
 - b. Survey distribution and format (electronic and PDF versions)
 - c. Confidentiality and sharing of the data gathered (this discussion should occur at the committee level, the executive board level and with the CARLI staff)
 - d. Location and length of time the data will be stored
 - e. If the participating I-Share libraries agree to sharing of the data set, who will have access and at what level of granularity will it be accessible
 - f. What incentives if any to provide to encourage possible respondents to complete the survey

Table 1. Suggested Timeframe

Date	Task	Assigned To
May	Write White Paper	Committee
April	Analysis Beta Survey Results	Committee
March	Send Beta Survey out	CARLI/Committee
February	Put beta survey in SurveyMonkey	CARLI
November/December/January	Finalize Survey Question Formatting	CARLI/Committee
August/September/October	Finalize Survey Modules/Wording	Committee