

**Affordable OCLC library services for small libraries through
“Library in a Box”**

OCLC Small Libraries Advisory Committee

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Introduction

OCLC has the products and services to transform small libraries. However, the library world views OCLC as a cooperative for larger libraries and consortia. Smaller libraries can be the long tail for OCLC services and can provide a critical mass helping OCLC reach web scale. Smaller libraries need a pricing model, interface, and training that can bring them into our cooperative. Smaller libraries are the next frontier for OCLC. In viewing this small library model it is important to view small “Library in a box” members as an aggregate. While individual libraries in the group may be a net loss, the aggregate will provide a new revenue stream as well as increased exposure and usage of OCLC WorldCat.

Library in a Box

The *Library in a Box* is a package of services brought together for the small library. Type of library is not the issue, but the size of the library is. Those libraries receiving *Library in a Box services* would have several of the following characteristics:

- Small in size
- Run by small staff often without formal training in librarianship
- High staff turnover (i.e. a new librarian each year)
- Isolated geographically
- Not a member of a library consortium.

Library in a Box would include the following products:

- Cataloging with CatExpress
- WorldCat Resource Sharing for interlibrary loan.
- [WorldCat Local “quick start”](#) to deliver single-search access to the resources of individual libraries and libraries around the world.
- Digitization component of CONTENTdm “quick start”, optional
- Content, a small NetLibrary collection, optional

Other products or services could be added, depending on the needs of the library, for an additional fee. Add-ons could include the two optional products listed above plus, but not limited to, retrospective conversion, bar coding, and contract cataloging.

Pricing

Pricing for this product is crucial to its success. Libraries that wish to purchase this new product would become a member of a virtual group to take advantage of a group services type of pricing. Pricing based on staffing FTE rather than population is preferred. FTE is a better indicator of the size of the library’s budget and its ability to purchase this new product. The pricing model used by the Idaho Commission for Libraries for their LiLI (Libraries Linking Idaho) program is a model to look at. See Attached table of fees. The Idaho model has a modest price for year one and the prices are doubled for year two. Library in a Box must start at a modest level with base price of \$300 - 500 and small 3-5% increases per year.

Issues for Development of Library in a Box

The interface must be simple and stable. The staffing characteristic of the target libraries makes it imperative that the product be simple to understand and use. The layout of the pages cannot change every couple of months, but must remain fairly static.

The look of the product must be clean, with few graphics. Many of the target libraries will be located in rural areas where access to broadband Internet will be limited. The product must be able to be downloaded as quickly as possible.

The cataloging services should allow for a match and click interface with a simple first screen. The WorldCat best match service could be a model for *Library in a Box* cataloging.

Documentation

Documentation for use of *Library in a Box* must be developed side by side with the product, verifying that all of the components fit together logically, function as designed and expected, and are compatible with each other. Documentation should be developed in a variety of formats.

- Full documentation on set-up and use of the product available online.
- Simple documentation on set-up and use of the product placed on index cards. A set of cards for each component of the product separated by tabs and bound together with a self-contained easel, allowing the cards to be placed next to the library workstation for easy access.
- A project plan for implementing *Library in a Box* at a library in a graphic flow chart format, including the following information:
 - Hardware requirements
 - Minimum network or connectivity requirements
 - Workflow charts and best practices guidelines for cataloging, processing interlibrary loan, delivery of materials, training of staff, and training of patrons. Several options should be devised to allow for differences in staffing size, i.e. a one-person library will do cataloging with a different work flow than a library with one person whose primary responsibility is cataloging.

Training

The initial training for this product will be crucial if implementation at the library is to be successful. Ideally a face-to-face, hands-on training would be the most effective. However, the isolation characteristic of the target libraries makes this impossible.

WebJunction can serve as the location for the various training materials discussed below. A *Library in a Box* community would be created on WebJunction. Libraries that purchase the product would be given a login and password to access the training materials from the *Library in a Box* community page. Online trainings as well as online discussion groups should also be available through the *Library in a Box* community page.

Librarians could be trained through virtual meeting capabilities in WebJunction. These virtual meetings would be archived for later review by library staff. A *Library in a Box* webpage could contain short videos or screen shot slideshows of step-by-step instruction. Examples of topics to be covered include searching for items in WorldCat, setting up the library's constant data and policy files, requesting or

returning an item through WorldCat Resource Sharing. Examples of short videos can be found at <http://www.illinoisplinkit.org/help-center/tutorial> ; these were developed for Illinois' Plinkit project.

Other essentials include a Frequently Asked Question page of the most common areas of training that need reinforcement. An example would be the question, "I am entering information to obtain a matching record for a book. There are two publishers listed, which one should I enter?" Training documentation should move the librarian step by step through each of the product's processes. This could be read online or printed out for study. It should include enhanced screen shots where the tabs, locations of data entry fields, etc are identified with circles or arrows. (An example can be found at http://www.rpls.ws/ILDS/oclc_screens.pdf; a document created at Rolling Prairie Library System to show its members how to update their OCLC constant data records or policy files.)

Develop ongoing support for the product that includes an online community of *Library in a Box* users with a group posting area where librarians can share concerns, ideas, solutions or questions about their use of *Library in a Box*. A chat component would require a scheduled monthly or quarterly chat for users and including OCLC staff, plus the provision for questions to be submitted in advance.

In addition, experienced users could volunteer to participate in a community of mentors. These Librarians would be OCLC members that use the products and are willing to talk with a new *Library in a Box* librarian about how to use this new product.

Marketing of *Library in a Box*

This product would be marketed to State Libraries. The product is not meant to replace statewide or regional consortia library management systems. *Library in a Box* is a product for states with small libraries that cannot afford to automate and join other resource sharing consortia.

Second tier of marketing would be to networks or consortia that provide services to small libraries. These may cover larger or smaller areas than the state libraries.

Third tier of marketing targets individual libraries that are located in a state or consortia area that is not offering the *Library in a Box* product. These libraries could purchase at the pricing level developed and be joined as an ad hoc group to the OCLC family.

Fourth tier is marketing this product to the EMEA, Asia Pacific and The Americas (non-U.S.)