

Joint TSPC-OPAC Vision Summit: Executive Summary and Key Ideas

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Report Taskforce

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Executive Summary and Key Ideas

On January 25, 2008 forty-eight SUL librarians and FCLA staff gathered at the University of Central Florida to conduct the first SUL OPAC Vision Summit. The purpose of the summit was to create a strategic vision for our OPAC and develop broad goals toward future OPAC development. As stated in the original summit proposal, the goal of the summit would be to create a “strategic planning document to guide the ongoing development of the OPAC ... This document would be provided to the CSUL Deans and Directors to guide their decision-making about the future of the OPAC and be helpful also for the collaborative efforts of technical and public services staff in analyzing and reporting problems and considering possible enhancements.”

This executive summary document will briefly report the content of six roundtable discussions, which formed the structure of the summit, and list the key ideas emanating from the discussions which will become areas of further study. A more fully elaborated strategic plan for the development of the SUL OPAC will be created after the committees have had the opportunity to study the ideas in greater detail. This strategic plan will contain specific recommendations for the SUL Deans and Directors.

Key Ideas

After the last report out of the afternoon roundtable discussions, a general discussion among the participants resulted in the identification of, and agreement about several key OPAC development ideas, which need further study. These development ideas include but are not limited to the following:

- Single sign-on to access an OPAC, which would offer an expanded suite of tools and information.
- Expediting the use of OPAC testing results into the development process.
- Further study of open source alternatives to Endeca.
- Increasing the frequency of the data loads in Endeca.
- Improving communication tools to better collaborate.
- Incorporating more user interface options in our OPAC.

Summit format and evaluation

The main activity of the summit consisted of six roundtable discussions followed by reporting sessions. Three roundtables had enough interest from participants to warrant morning and afternoon sessions. Participants selected the roundtable discussions in which they would participate. Each roundtable had one or two leaders to facilitate the discussion, provide background readings, and report out to the larger group on the following:

- 1) What are the key issues for this roundtable discussion topic?

- 2) What are principle benefits and costs to implementing, practicing, or developing any process, products, or service from the issues that your roundtable is exploring?
- 3) What action items does your roundtable group propose which could be part of the strategic visioning document for the future of the SUL OPAC?

The organizers collected thirty-five summit evaluation forms. Categories asked for feedback on the summit overall, roundtable discussion groups, facilities, and the summit facilitator from UCF, Margie Chusmir. The majority indicated that the participants were highly satisfied in all categories with the remainder indicating they were satisfied in most categories (see Appendix B). In the comments segment, the following themes emerged as the positive highlights of the summit:

- Meeting subcommittee members face-to-face for the first time
- Interaction between technical and public services librarians
- Cross-fertilization of ideas
- Need to continue this kind of contact to further development of the OPAC collectively
- The use of a professional facilitator (Margie Chusmir-UCF) helped the summit run smoothly and kept everyone on track

Roundtable Reports

Descriptions of the six roundtables and their key ideas are presented alphabetically and not in order of importance.

1. Communication Issues Roundtable

Improving communication among SUL committees and subcommittees and with library users is critical to furthering the development of the SUL OPAC. This roundtable identified internal communication issues among SUL librarians, between SUL librarians and Directors/Deans and external issues between library professionals and library users.

Key ideas identified:

- Revisit the composition and charge of the OPAC subcommittee to include more stakeholders and leverage expertise with the SUL libraries.
- Concretely define the roles and responsibilities of the subcommittee liaisons.
- Conduct inventory of existing communication tools and define the purpose of each (i.e., FCLLIST, various OPAC blogs, wikis, and listservs, etc.) with the goal of improving communication among the SUL stakeholders in OPAC development.
- FCLA and OPAC subcommittee to collaborate to develop trainings and workshops for stakeholder librarians and coordinate attendance at conferences with regular report backs to committees.

- Establish and fund an SUL organizational structure dedicated to assessment and usability (incubate a program that could eventually be instituted at each SUL); build in a feedback loop to all internal stakeholder groups.

2. Description and Access in the New OPAC Roundtable

Roundtable sessions on this topic focused on indexing and cataloging issues impacting the development of the OPAC. The sessions were largely attended by technical services librarians.

Key ideas identified:

- Access to non-MARC items including PALMM, Digitool and article records.
- Browse indexes for precise searching.
- Increased communication between technical and public services librarians in creating and refining the OPAC.
- Dynamic update in Endeca to reflect rush cataloging, new or changed holdings, records suppressed or deleted, and correct access points and description.
- Single bibliographic record to minimize problems with merged records and decrease duplication of effort.
- Single OPAC for all users – casual users, researchers, librarians.
- Other issues: refinement and fine-tuning of facets to enhance search and retrieval, revisit mappings of MARC fields to facets, examine mappings for non-MARC metadata to ensure accessibility through facets.

3. Integrating New Resources in the OPAC Roundtable

This roundtable deliberated which types of resources to include in, or link from, the catalog interface.

Key ideas identified:

- Users are confused by multiple avenues to library resources and would prefer access via a single portal.
- Users augment their research with non-library resources and expect the library to provide pointers to high quality, educational material not owned or licensed by the library.
- Well-designed facets and an intelligent recommender service can offset the precision and navigability issues inherent in diluting the pool of resources accessed through the catalog.
- Enriched catalog content (e.g., reviews, covers, summaries), the defacto industry standard, will help raise user awareness of the resources in the catalog and increase usage.

4. New OPAC User Features Roundtable

This roundtable discussed ways in which new technologies and patron empowerment functionality could be introduced into the OPAC.

Key ideas identified:

- Single User Login: one place where a patron could read their email, view their checked-out books, see their courses, etc.
- Personalization/Customization of the OPAC, ranging from what color the screen is to book recommendations based on what they have been searching or checked-out.
- User generated content such as ratings, comments, and tagging. Like an LC subject headings, user tagging provides another means of organizing information by being able to “tag” books with a word or topic such as “Oprah’s Book Club”, “Readings for ENC1102”, etc., and then be able to view other books with such tags. LibraryThing for Libraries was discussed as a company that provides this service.
- More interface options/interactivity – being able to send a call number via text message, having the OPAC tell you what floor a book is on, being able to export citations, having a chat box imbedded into the OPAC enabling chat directly with library staff if the patron has questions.
- Developing an OPAC which achieves the simplicity of Google in basic searching and viewing, the complexity of Amazon.com in the record display, and the personalization of Facebook or Netflix.

5. New Technologies Impacting OPAC Development Roundtable

This roundtable discussion included a presentation about the distinct but interrelated processes that make up the Endeca implementation and the costs and benefits of new technologies such as open source software to develop the OPAC.

Key ideas identified:

- Costs and benefits of faceted navigation especially in the context of Endeca.
- Costs and benefits to replacing Endeca with open source software such as Solr or Lucene.

6. OPAC Interoperability Issues with Other Systems Roundtable

This roundtable discussed the issues involved in how systems interoperate with the OPAC to the benefit of the user and what costs and benefits can be expected.

Key ideas identified:

- The primary role of the OPAC as a discovery interface.

- Accessing the OPAC from within another interface (e.g. campus portal).
- Bringing outside content and services into the OPAC, such as WorldCat records from other libraries.
- Inclusion of ILLiad and a course reserves module within the OPAC interface.
- Access to licensed content from within portal/course management systems.
- Costs and benefits of linking OPAC with external campus systems.

Summary

While the OPAC Summit participants investigated many aspects of OPAC design, there was a good deal of consensus over the future of the OPAC. Single user validation for moving through library and even university information space from within the OPAC was a major component of this vision. Making library data ubiquitous within a variety of devices and platforms was another. Concerns were expressed over the best way to achieve these goals, by development using a commercial product like Endeca or whether to go completely independent by choosing to develop a catalog using open-source software. Finally, all agreed that the OPAC needs to be a deeper, richer, and more intuitive information experience, incorporating graphics, user tagging, subject clouds, multimedia files and other types of tools that go beyond standard bibliographic control in order to bring our users in to a space where they can explore our information in the way that they are accustomed to finding information in search engines. This Summit was a good first step in investigating how the State University Libraries of Florida can realize this vision.

Next Steps

1. Both TSPC and OPAC Subcommittee will review the key ideas and gather input from the larger SUL library community.
 - a. Prioritize and categorize ideas
 - b. Determine which ideas need further study
 - c. Develop timeline
 - d. Determine which committee or taskforce will examine the idea and develop it into a recommendation
2. Create a taskforce to develop the summary report into a more fully elaborated document with recommendations and a cost/benefit analysis

Appendix A

Roundtable Discussion Topics and Personnel

| Roundtable Name | Leader(s) | Number of participants |
|---------------------------------------|---|-------------------------------|
| New OPAC Technologies | Josh Greben (FCLA) | 17 |
| New OPAC User Features | Melinda Gottesman (OPAC-UCF) Jon Blackburn (FSU) | 20 |
| Description & Access in the new OPAC | Barbara Tuck (OPAC-UNF) Mary Ann O'Daniel (FCLA) | 12 |
| OPAC interoperability w/other systems | Michael Kuczak (TAG-UNF) Jennifer Kuntz (FCLA) | 10 |
| Integrating new resources in the OPAC | Betsy Simpson (TSPC-UF) Jean Phillips (FCLA) | 19 |
| Communication Issues | Susan Heron (TSPC-USF) Nancy Cunningham (TSPC-USF) | 6 |

Appendix B

TSPC-OPAC Visioning Summit 2008

Brief Report by Nancy Cunningham, Chair –OPAC Subcommittee

January 28, 2008

Attendance: 49 participants signed up and 48 attended: twelve participants from TSPC, fourteen from OPAC subcommittee, two from Technical Advisory Group, and one member from ILL subcommittee. There were several participants that did not belong to either subcommittee.

There were 34 summit evaluation forms collected at the end of the summit.

The ranking for the items follows:

Materials provided prior to the summit:

| Highly Dissatisfied | Dissatisfied | Neutral | Satisfied | Highly Satisfied | N/A |
|---------------------|--------------|---------|-----------|------------------|-----|
| | | | 19 | 15 | |

Discussion groups during the summit:

| Highly Dissatisfied | Dissatisfied | Neutral | Satisfied | Highly satisfied | N |
|---------------------|--------------|---------|-----------|------------------|---|
| | | | 13 | 21 | |

Meeting facilities:

| Highly Dissatisfied | Dissatisfied | Neutral | Satisfied | Highly satisfied | N/A |
|---------------------|--------------|---------|-----------|------------------|-----|
| | | 5 | 16 | 12 | |

Food:

| Highly Dissatisfied | Dissatisfied | Neutral | Satisfied | Highly satisfied | N/A |
|---------------------|--------------|---------|-----------|------------------|-----|
| | 1 | 4 | 10 | 19 | |

Facilitator: Margie Chusmir

| Highly Dissatisfied | Dissatisfied | Neutral | Satisfied | Highly satisfied | N/A |
|---------------------|--------------|---------|-----------|------------------|-----|
| | | | 5 | 29 | |

Overall Summit:

| Highly Dissatisfied | Dissatisfied | Neutral | Satisfied | Highly satisfied | N/A |
|---------------------|--------------|---------|-----------|------------------|-----|
| | | | 10 | 24 | |

Comments:

Specific feedback (positive or constructive) about any of the items above:

- Excellent accommodations
- Excellent facilitator
- Loved the contests!
- It was a thought-provoking and energized meeting. It made it especially valuable by having a professional facilitator keep us on track
- UCF was fantastic host. Thank you.
- The OPAC committee has done so much. Great.
- Good pace: facilitator did good job of managing time.
- Great brainstorming and flow of ideas.
- If group leaders could send out assignments a little earlier. Only had one day to prepare for group work.
- This was a very good gathering. I do hope we can make things happen!
- Need another room for folks sharing main meeting room 223. Wireless access was weak in 223.
- As someone who is not involved in Endeca implementation, I did not get that there was enough information about different session provided beforehand. I only saw the title, no description. As a result, I ended up in the wrong group.
- A little long, but very complete
- Have some, non-carbohydrate-heavy food options
- We should do this again!

Overall highlight of the summit: Comments

- Meeting people face to face
- Interaction among the groups, especially Tech services and Public Services. Liked the mix in the discussion groups, it made the discussion richer.
- MANGO!
- Putting names to faces from the conference calls. Enthusiasm.
- Cross-fertilization of ideas-great benefit to meeting with colleagues from around the state

- Afternoon session on incorporating resources
- The report-back sessions
- Meeting people face to face
- Putting faces with names and seeing top themes
- Communication of interested people. Need for a lot of further work.
- Good opportunity for discussing issues, establishing commonalities, and building consensus
- Getting to meet people
- Having a face to face, broad meeting. We need to have them more frequently, say, once a year like former joint meetings
- The breakout sessions were good
- Lunch was good but my favorite part was listening to everyone's different ideas
- Working in groups, similar themes across the break-out sessions
- Discussion groups/breakout sessions, and getting acquainted
- Being able to meet people I listen to on conference calls. Networking
- Seeing that there are similar priorities across the state
- Ideas and interaction
- Lots of issues for OPAC and Endeca that are not being met. Very surprising to me, as I thought I was up on the latest issues. Eye-opening experience! Thank you!
- Face time with statewide colleagues
- New user features in AM discussion group
- Face to face discussions – very energizing
- Appreciated summaries of roundtables
- Seeing people I've only communicated with online
- Hearing what is important to SUL librarians and especially to meet face to face
- The conclusion when we shared ideas. Also, meeting face to face.

Considering your institutions academic calendar, what would be the ideal timing for this type of conference? Comments:

- Last week of January
- Any time
- January, late
- Early February, mid-October
- February or early March
- 4th week of May
- Late January
- Second week of May, second week of August
- Late January, all February, early summer, late fall
- Summer, June, with CSUL follow-up in August
- 3rd week of January
- 3rd week of January or 3rd week of May
- 2nd week of March
- Late January is fine
- Summer, July, 4th week of July
- Late March, early April
- Summer semester

- After end of classes, anytime
- 2nd week of May
- Anytime is good
- January

Do you have suggestions for the organizing committee in regard to the future meetings?

Comments:

- Make it annual
- Have a professional facilitator
- More open communication
- Keep up the good work
- Invite CSUL (Deans/Directors) as a panel discussion
- Use the same approach
- Maybe standardize the reporting process, all notes on flip chart and a place to post them quickly
- Excellent organizational preparations for the meeting. Thanks go to UCF folks for allowing us to use their facilities! Depending on what happens after this meeting to the plan, decide if we need to meet again!
- Keep meeting centralized
- Maybe video all the sessions so we could view other ones later
- Further clarification of discussion group topics
- Programming on site- code4LIB
- Let's have another follow up meeting in January 09 to review what we have accomplished and look toward the future