NICE TEAM MEETING MINUTES

March 21, 2023

Meeting began at 8:31 am

Team Members Present: J. Johnson (NWLS), G. Rae (NWLS), K. Zimmermann (WVLS), M. McLimans (WiLS), M. Clark (WiLS), A. Johnson (MCPL), M. Lank-Jones (Hayward), P. O'Connell (Minocqua), T. Blomberg (Rib Lake), S. Heskin (Superior), T. Schmidt (Mercer).

Others Present: none

Team Members Absent: none

I. Focus Group Update

M. Clark (WiLS) provided an update to the team on the focus groups.

Four focus groups were held during the first week of March. There were 45 participants total with 26 from NWLS and 19 from WVLS. Many different roles in the libraries were represented, which led to a great variety of voices.

There was no new information shared that did not align with the survey results. In addition, there were not a lot of differences in concerns between the two systems. Members from both systems identified very similar opportunities and concerns.

Common identified benefits included:
- An overall focus on patrons.
- Increased access to resources for patrons, including ease of access.
- Benefits to patrons that live on the borders of systems.
- Potential cost savings.
- Potential to save staff time.

The shared ILS / consortia scenario most preferred by survey respondents matched up with feedback from the focus groups. Those in the focus groups felt that moving forward with NWLS and WVLS sharing an ILS platform and collections with steps towards sharing practices/policies was as the most patron focused option.

Overall themes from the focus groups included keeping the patron experience as a primary focus and support for increased ILS collaboration.

Focus group participants expressed the importance of a prioritized and scheduled list of issues to be addressed in the future, clearly communicated and easy for stakeholders to understand.

Focus group participants emphasized the importance of open and transparent communication throughout the process to establish trust.

System staff are unified in their support for increased collaboration.

A NICE team member noted that it was great to hear that it sounds like everyone is on the same page, looking for the best option that will provide the best access for the most patrons at the lowest possible cost.

II.   Survey Results
M. McLimans (WiLS) shared a presentation summarizing the survey results.

There were 118 responses. 38% were from WVLS and 62% were from NWLS. All but 5 libraries had at least one response.

The survey results included good representation from all solicited library roles in each system. The survey also included good representation from newer and seasoned staff.

A summary was shared of the survey responses to questions regarding the benefits of a merged ILS. For every item listed, at least 75% of respondents indicated it would be either a benefit or significant benefit. The highest rated benefit from all respondents was improved access for patrons to a larger and more diverse collection.

Based on role, library directors and library staff rated improved access for patrons to a larger and more diverse collection as the top benefit. System staff selected the deduplication of work as the greatest benefit.

A summary was shared of the survey responses to questions regarding the concerns of a merged ILS. Survey takers overall identified potential increase in cost and loss of autonomy as their greatest concerns. Levels of concern varied by role.

Averages indicate the overall perception of the benefits are higher than the perceived concerns when comparing responses to the potential benefit statements versus the concern statements, the averages indicate the overall perception of the benefits are higher than the perceived concerns.

Concerns varied based on the municipal population served, and by system. Overall, smaller libraries, serving municipal populations under 5,000, shared more concern about increased costs than larger libraries. In addition, smaller libraries from NWLS shared more concern about the loss of autonomy and potential increase in cost. Meanwhile, smaller libraries from

WVLS shared more concern about delivery logistics and potential changes to patron access/filling holds.

Larger libraries from NWLS, serving municipal populations over 5,000, shared more concern about potential changes in collection expenditure standards and loss of autonomy. Larger WVLS libraries shared more concern about delivery logistics and potential changes to patron access/filling holds.

Respondents were asked about factors that have changed since the effort to merge ILS's from 10 years ago. Increased library system collaboration over the past decade was the most selected item that could contribute to a big difference in outcome today. The next selected item was meeting needs have changed with an increased comfort with virtual gatherings.

These results can be helpful when thinking about priorities and communication strategies for the NICE team moving forward.

Survey responses indicated a high level of agreement that combining ILS services would improve service to libraries and patrons. There is also strong support for standardized circulation policies and practices, changing ILS platforms – if needed, and new/different staff focuses if combining services results in staff role changes.

When it comes to the most desirable scenario for the future, most survey takers responded that they preferred a shared platform and collections with steps towards sharing practices/policies. There was not a difference between systems. There is strong support for further considering an ILS merger of some sort. Only 7% of respondents indicated a preference for no change. There is robust support for pursuing a joint ILS consortium.

Overall Key takeaways from the survey were:
- The patron experience matters. The top perceived benefit of a shared or merged ILS was improved access for patrons to a larger and more diverse collection.
- Survey takers' perception of the benefits of the merger is higher than their perceived concerns overall.
- Differences by system, municipal size, and role exist in some places, but those are most helpful for messaging and addressing potential concerns versus indicating a group is going to be against a potential ILS merger of sorts.
- Most people support an ILS merger of some sort.
- Early analysis of focus groups show alignment with these key findings.

NICE Team members were encouraged by the results shared and expressed appreciation for the depth of the presentation. Team members were especially thankful for the breakouts of information based on differences of concern by library size.

A question was asked about additional information gathering about the differences between the two systems' answers. For example, delivery logistics. M. McLimans (WiLS) noted concerns were shared about changing workflows, particularly for an increase in transited items and borrowing. M. Clark (WiLS) added that concerns were shared about space for items in transit and the time items would be in transit across a larger geographic area.

A discussion occurred about the best method to share the survey results. M. McLimans (WiLS) and M. Clark (WiLS) offered to create a one-page document featuring the key takeaways of the results. In addition, a video excerpt of the survey presentation from this meeting recording will be made available. Final results from the survey and focus groups will be compiled by M. McLimans (WiLS) based on NICE team feedback in April.

III.   **Standing Item – Reporting of questions that have come up and status of replies.**

Nothing new was shared.

IV.   **Standing Item – Any communication needs?**

J. Johnson (NWLS) and K. Zimmermann (WVLS) have been talking about project management and reaching all levels of staff about the activities of the NICE team. Team members were asked to share about how information is being shared with library staff now, and preferences for communication pieces. A one-page document that directors could share with staff and board members was suggested. NICE team members responded positively to this idea.

It was clarified that decision making processes and opportunities for further communication would continue after the report in June.

K. Zimmermann (WVLS) asked if enough information had been gathered to be able to address concerns raised in surveys and focus groups in the final report. M. McLimans (WiLS) noted that in the focus groups it was evident that participants did not expect to have all the answers right now. Instead, the need is to know the order of operations, what needs to be considered and when they are expected to be addressed. She noted that the feasibility report could include an implementation plan outlining the anticipated order of operations and items to consider with an intent to dig into the details.

The NICE team briefly discussed the scope of the implementation plan, and inclusion in the June report. It was clarified that the implementation plan would include an outline of next steps, but not every detail.

J. Johnson (NWLS) asked about a realistic timeline for a merger. M. Clark (WiLS) shared that it is difficult to say. From her experience, at least 6 months to a year may be necessary to work through all the policy needs. M. Clark (WiLS) noted that the data indicates there are not many barriers to a successful merger. M. McLimans (WiLS) noted that working back from hard deadlines can be helpful.

M. McLimans (WiLS) and M. Clark (WiLS) indicated that the feasibility report could also include a decision making matrix to outline how decisions will be made, and what priorities will be considered in the decision making process. K. Zimmermann (WVLS) and J. Johnson (NWLS) noted that this would be very helpful when communicating with libraries. It was noted that a communication plan can make it clear when communicating about concerns even when an answer isn't currently available, stakeholders have a clear understanding of what goals and values will be used when making decisions. G. Rae (NWLS) noted that library boards could also find it helpful to know that there is a plan for how future decisions will be made.

M. McLimans (WiLS) reminded the NICE team that both the survey and the focus groups had high level of consensus, and there is a strong foundation for collaboration.

Meeting ended at 9:57 am.

Respectfully submitted,

Rachel Metzler (WVLS), Meeting Recorder