Analyzing Comments for Themes

Abstract

Chapter 2 examines themes that commonly arose in the comments: cost; the benefits and drawbacks of consortial membership; ILS functionality; customer support; and open source software. While comments on cost are almost universally negative, the other topics reflect a range of opinions. Librarians want mature, intuitive software with responsive vendors. They disagree on whether their current products, or open source alternatives, provide this.

We categorized the comments from the free text field to look for hot-button issues. Popular areas of interest included costs; consortia; open source (no doubt partly because other survey questions directly addressed this); ILS functionality; and customer support. Libraries commenting on their support typically either loved it or hated it, and this issue will be addressed in more depth and in the context of specific vendors in chapter 4. The other themes will be addressed here.

Costs

A very large number of comments centered on the costs involved with annual maintenance and support. Not only were the costs perceived as high, but the annual increases were burdensome. Many libraries noted that given budget pressures, current levels of cost for maintenance were not sustainable. A few were satisfied with their ILS and support, but still considering migration due to cost concerns. Some knew they were making tradeoffs in terms of functionality to reach a good price point, but were satisfied with the overall package. For many, however, the costs,

in terms of both funds for a new system and the personnel efforts required, precluded change and forced continuation of the status quo despite some degree of dissatisfaction.

Consortia

Commenters addressed both the benefits and the drawbacks of consortia membership.

On the positive side, many libraries make use of an automation system provided through a consortium. This arrangement allows them to benefit from the use of a full-featured system, at a cost lower than they would pay individually, and to rely on technical support provided through the consortium. Several comments indicated that the consortium made it possible to use a system they otherwise couldn't afford or to benefit from technical expertise they did not have in house. Other libraries not in consortia expressed a hope that they could find partners that would allow them to experience these benefits.

However, some libraries sharing an ILS though a consortium expressed concerns regarding the choice of system imposed by the consortium, constraints in functionality, and issues in the way that consortium delivered services. These libraries may have been dissatisfied with the choice of ILS—in some cases thinking it was a step backward from their previous automation system—but they felt powerless to effect change. Many libraries involved with consortia noted that they were unable to evaluate the performance of their ILS vendor or provide feedback because their support was mediated through the consortium. This in turn may make it difficult for vendors to be appropriately responsive to users' needs.

Open Source

Open source ILSes have been a prominent topic of discussion in recent years, and the survey has specifically addressed this since its inception by asking about level of interest in open source products and specific products under consideration. While some pockets of interest in open source ILS software surface, the survey does not reveal widespread interest outside the ranks of libraries already invested in one of these systems. Libraries' comments on this issue are diverse and the overall picture is complicated. (See also the section on interest in open source in chapter 3.)

Just over 10 percent of survey respondents currently operate open source ILS products, with generally moderate to high satisfaction scores. Open source was among the most prominent topics in the comments among both adopters and nonadopters (possibly because the survey specifically asked about it); despite the relatively high satisfaction of the adopters, most of the comments by nonadopters expressed concern.

Among libraries running proprietary systems, many felt that the open source products lacked the functionality and maturity they required; others noted that they did not have the in-house technical expertise they anticipated would be necessary to implement open source automation systems. It's clear that many libraries continue to believe that the use of open source software requires local programming capabilities and may not be aware of the fully managed options available through specialized support and hosting companies.

Some functionality concerns were quite specific. One library "is using many self-check machines (3M), and we need a ILS with SIP2 protocol support." Another needs "a robust Spanish interface, support for floating collections and an acquisitions module"; another echoed the concern about the "lack of an integrated acquisitions module." One said, quite simply, "The last time our systems administrator tried to install Koha, it didn't work." However, the majority of these comments were phrased in general terms, such as "We don't feel the open source ILS options are mature enough, yet." Functionality, maturity, and viability were the recurring ideas in this category.

The availability and cost of support and the presence or absence of in-house expertise were also frequent themes. For example, "We do not have the resources (staff, skill-set) to even think about open source products, especially if we had to go it alone, much as we might like to." This succinctly addresses three common themes: first, that organizations with no immediate likelihood of migration to open source are still interested in it; second, that lack of technical expertise is a significant barrier to ILS adoption; and third, that some libraries see consortial help as necessary to adopt such products.

It is important to note that these concerns were expressed in both positive and negative terms. Some libraries dismissed open source ILSes as a viable option; others said that they will be interested in open source once these concerns are addressed; and still others, which have adopted open source products, noted that the availability of in-house or consortial expertise was a key factor in their decision.

Cost was also an important theme in comments, and again for mixed reasons. Some libraries are interested in open source specifically, if not solely, to save money, citing the high cost of proprietary systems. Others have found that the hosting or development costs of open source do not compete favorably with the licensing and support costs of their existing proprietary systems. Indeed, while some libraries have found open source to be cheaper, others have found it more expensive.

The dominant theme in libraries' comments on open source cost, however, was uncertainty. One library said, "We do understand open source does not mean free but don't have a good understanding of the potential cost . . ."; another echoed this with "There is interest in open source tools, believing they would be a panacea to all woes, but a lack of real knowledge about the maturity of such products and the actual costs of implementation and operation." For at least one library, this uncertainty is definitive: "In these financially challenging times, libraries would be prudent to acquire stable systems with known costs, rather than rolling the dice and hoping that 'open source' will be a panacea for their automation needs."

Finally, one library foreshadowed possible trends with a heartfelt plea: "Clear directions for complex procedures . . . do not exist for setting up either system and so they seem at present to be restricted to those with database coding skills. Please fix this, open developers! We want to use your systems!" In other words, while the vast majority of libraries right now are invested in proprietary solutions, they are not necessarily committed. Technological, philosophical, or financial interests sometimes favor open source adoption. If a full-featured system with turnkey or cloud simplicity emerged, it could induce a tipping point in the market.

Data, Software Architecture, and Functionality

Interest in software design and function was also a common theme in the comments, ranging from front-end functionality and usability to specific, technical software architecture concerns.

Far and away the major theme in this category was interest in, or use of, discovery layers and other new-generation catalog features. (Note that, although the comments field was unrestricted, two of the survey

questions asked about interest in such products.) Commenters represented libraries with existing discovery systems; those in the process of investigating or acquiring such systems; and those that are interested, but cannot presently afford to implement them. Their comments rarely went in depth on libraries' opinions of these products. The percentage of libraries in the sample considering acquiring such systems has remained roughly constant, at 20–25%, since 2007; some of these are looking for a first system, while others are commenting on—or looking to replace—an existing system. The survey does not permit reliable statistics on how many libraries have already implemented such a system.

The next most common theme was usability. Some libraries were dissatisfied with their product's ease of use; for instance, "Far too many clicks, drop down bars, and changing of default settings are required to perform simple searches" or "If you look up a patron it's in one 'wizard' then if they check something out, it's another 'wizard' to pay a fine is another, to renew items another. Everything is in a separate place." One

summarized it thus: "With the world used to speed and the intuitiveness of Google or Amazon.com this software seems clunky and outdated."

Perhaps in line with this interest in modern, streamlined features, the comments reflected a certain interest in cloud computing and hosted solutions. Although few comments went into depth on these interests, those that did suggested that tech support and cost savings were potential benefits of moving to the cloud.

Finally, there were comments expressing interest in the fine details of software functionality. Around half of these praised, or wanted, the ability to customize their product (for example, its look and feel, or its reporting options). The other half reflected specific technical interests: for instance, desire for (and use of) exposed application programming interfaces and integrability with third-party modules.

The overall message is that librarians want their software to be intuitive, capable, and modern. A small but articulate minority care about the details of architecture and function; they want to be able to make their ILS work for local needs.