Biz of Acq: Online Acquisitions Tools: What Are Library Service Providers Thinking?

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Biz of Acq — Online Acquisitions Tools: What are Library Service Providers Thinking?

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Vendors and library service providers collaborate with librarians across the world to incorporate their collection development and acquisitions workflows into various online bibliographic databases and ordering tools. As Collections Consultants with Ingram Coutts, we often hear the joys and pains from librarians using these ordering platforms. A reoccurring question is, “What were you thinking when you designed this?” Sometimes this is a positive statement, as in, “Did you truly build this just for me?” or, “Is this the first stage in something great to come?” This can also be a negative statement, as in, “Why didn’t you take our institution’s perspective into account when you made this change?” or, “I’m worried this development will be more disruptive than helpful.”

We regularly act as liaisons between librarians and our company’s product development teams, communicating the wants and needs of librarians to those who have the tools and know how to make things happen. We decided to go directly to the experts and get their views on product development and what library service providers are really thinking when changes and enhancements are made to their platforms.

The discussion below is the result of telephone conversations with Bob Nardini, Vice President of Product Development at Ingram Coutts, and Andrew Pace, Executive Director, Networked Library Services at OCLC.

SF: Tell us about the acquisition tools you develop for libraries using your services — why these products and how do they work?

AP: For the purposes of this conversation I’ll talk primarily about WorldShare Management Services. Part of “why” here is discovering gaps in our approach to a networked library service, particularly when dealing with library collections. You can have ILL and cataloguing services and now discovery services, but what about the actual collection management? Why hasn’t that moved up to the network level? Part of the challenge is that integrated library systems were designed before cloud computing, before the Internet had even become part of library environments. The challenge in a nutshell is that integrated library systems were incapable of dealing with the changing nature of collections and the changing needs of patrons and were incapable of dealing with the kinds of collections libraries were spending the majority of their money on.

Before coming to OCLC, I was at NCSU Libraries working in IT on systems problems. We had just launched a new discovery interface and were struggling with what we were going to do about the ILS — essentially a dinosaur. This was the fall of 2007, and I got a glimpse at OCLC of the possibility of moving these things to the cloud network. It was then I had an epiphany — we could take the ILS apart and put it back together with networked technology. This was the idea when I joined OCLC; we needed to dismantle and rebuild with 21st-century technology.

BN: The purpose of OASIS is simple — it allows customers to do business with us. It allows our customers in academic libraries around the world to find the titles they need — whether known or unknown — and place the order. It is a simple concept as there are two basic points that matter: find the title and order it. But there can be many steps in between searching and ordering, and we must give libraries many different routes from point A to point B with lots of substations along the way.

SF: We know that these different routes to an end can result in a lot of feedback from customers on how the product can be enhanced. How do you decide which enhancements to pursue? What factors do you need to take into account before pursuing an enhancement?

BN: We wish every library in the world had the same workflow and placed orders in the same way with the same systems and the same local data, but of course this is far from the case. Libraries have all sorts of ways to order. Before working on OASIS, I had a similar role with YBP developing GOBI functionality, so I’ve had a hand in both the major systems academic libraries use to buy books. Whenever a change is proposed, what do we do next? Well, we think about various categories that could influence the decision: will it create more sales? Direct or indirect sales? Which customers are asking for this change (if any)? Are they large? Are they new? How will this change fit into workflow for other libraries? Will it benefit just a small number of libraries or a larger number of libraries?

And then you have to think about the level of difficulty. Here is where we see lots of back and forth between library and vendor, and between vendor rep and IT. How hard would it be to make this change? How long will it take? Many proposed changes seem simple but turn out to be not so simple, and those of us not in the “tech” side may not be aware of extent of the difficulties. Just recently I asked IT to change some wording on OASIS. It turned out we had to wait for a bigger, formal release because that sentence was tied to a piece of underlying code, while other wording wasn’t and could be changed right away. Who knew? This is a small but revealing example of how things go. Obviously the easier the change the more likely we are to do it.

We also have to think about whether the competition is doing this. How will this help us in the marketplace strategically? Does this fit the functionality that we already offer?

AP: We respond to requests for enhancements in a variety of ways. One thing that helps is using a specific development methodology. Rather than a waterfall development methodology used in the past, we’ve moved to an agile model where we have 2-3-4 week sprints of functionality development. We have 158 customers using WorldShare Management Services in seven countries and are introducing 20-25 new features every quarter, pushed out automatically. In the last release in August, 83 percent of new features were the result of direct feedback from our current user base.

Another consideration is critical mass — is it one library or several libraries asking for this feature? We have 25 years of local system development to catch up with, so there is always plenty to do!

OCLC’s clarity of mission helps with business decisions about when to help and what can be done. Starting from scratch also helps with overcoming barriers. Our main question is will there be a good “network effect” possibility with this change? We are also looking at the market reaction to change and adjusting if needed. We regularly run into localization and segment requirements, public libraries vs. academic libraries, for example, and the need to carefully balance all of those things. Part of continued on page 67
our strategy is also planning a “careful march” to measure the impact of change and adjust quickly when necessary.

**SF: How do you see new acquisitions models developing? It seems like there is a bit of push-pull happening, with libraries sometimes driving development and vendors sometimes pulling customers along.**

**AP:** Often, the second mouse gets the cheese. Some people wait to see what the service provider’s approach is; some people wait to see if an effort will fail or not. When moving library services to the cloud, some people didn’t jump on board immediately because they were so entrenched in the model of local systems. Now OCLC is comfortable as a market leader because we had libraries willing to take chances with us. I’d say we had about 50/50 push-pull in developing WorldShare Management Services. Libraries have been doing what they’re doing for long enough, they knew where the inefficiencies were and knew things they wanted to change, so there was a bit of pull. But some of it was OCLC seeing the network effect of sharing and discovery and trying to push and apply that network effect to other areas. The push and pull became both market driven, because we try to get as close as you can to your customers.

**SF:** Using WorldCat as the database of record is a massive example of how doing something to scale allows you to do it differently.

**BN:** For years our company’s eBook strategy was focused on our own MyiLibrary platform. But now that the competition among academic eBook platforms is so intense, we’ve changed that strategy. There is no one platform with all the best features and all the best titles to itself. Libraries have made their choices to prefer this platform or that platform, and as I’ve already said, it’s not so easy to change course. Now we are integrating other platforms into OASIS, side-by-side with MyiLibrary. EBSCO was the first, our work with EBL is well underway, and others will follow. So, now OASIS is not only a way to integrate print and eBook purchasing, but also a way to integrate different eBook platforms.

**SF:** Dismantling and rebuilding is an important part of maintaining relevant products. How do customers respond to radical changes?

**AP:** This is the “WorldShare Paradox”: providing libraries a platform on which they can do the kind of work they’re used to doing while simultaneously allowing them to do their work differently so they can do different things. Change is hard but I’ve seen it embraced with enthusiasm by hundreds of libraries and thousands of librarians and library staff. OCLC wanted to leverage every method possible to foster cooperation within each library and amongst all libraries. It is overstated that libraries don’t want to change. They want to change in ways that make sense, make them more efficient, and save money. Libraries will make changes if doing things differently allows them or their library to do different things. Our goal is to create efficiencies in the library that will allow libraries to use their time in better ways. In collection management, libraries are spending more time on things that are unique to them and less time on things that are shared. Our strategy is also planning a “careful march” to measure the impact of change and adjust quickly when necessary.
to keep going. Then you shift from one to the other. It’s very difficult and doesn’t always go as you would like. Many customers are understanding, but others are less so. In the early days, prior to any of the kinds of systems we’ve been talking about, we would send sets of microfiche to libraries once a month. These would be read by libraries to find out what books were available at what price. It was a snapshot of our database. Later, some people weren’t happy about getting rid of microfiche, and so we continued to mail it to a few libraries for a couple of years into the online era. But we had to change, and it wasn’t always pretty during those transition periods. Most librarians understood the need, but not every librarian you interact with over the course of these transitions is a happy camper. Obviously the smoother something goes the better the conversations are. As long as libraries know we are working hard to address any problems that arise, we have the room to do what we need to do.

And sometimes what we need to do, instead of the usual incremental changes, is to start again, with a system that’s been entirely rewritten. With any system, past a certain point, incremental change isn’t the best approach. You have too many grafts, too many workarounds. Having gone through this several times, I think that’s always been the right decision in the end, although not everyone among the customers would necessarily have agreed at the outset.

**SF**: Any closing comments?

**AP**: This is an exciting time of cooperation between libraries, service providers, and dotcoms! The general ecosystem of library service providers and Web providers is changing rapidly and has been important in getting us out of the walled garden era of the early 1990s.

**BN**: To me, looking back, the whole period since the early 1990s has seemed like a sprint. There hasn’t been a single day where I’ve been able to think, “OK, finally done.” You are always moving, always weighing, always making choices, always trying to listen — and to find the right questions.