Editor's note: The following is an edited transcript of a panel discussion on staff involvement in library automation. The panelists are: Judith A. Drescher—now director of the Memphis and Shelby County Public Library and Information Center and former director of the Champaign (Illinois) Public Library and Information Center; Christopher Syed, supervisor of Education Services for North America, Library Systems Division, Geac Computers International; Barbara Shaw, Database Maintenance Assistant, Massachusetts Institute of Technology Libraries; and Stella Bentley, Planning and Budget Officer, Indiana University Libraries.

Drescher: Each of us on the panel represents very different points of view and each one has different experiences with automating libraries and involving staff. Barbara Shaw is an employee. She has observations about her present situation at MIT that others on the panel had not considered and really some of us had never heard. She wishes to bring these factors to your attention—i.e., what it is like if you are not fully in communication with the administration when you are working with an automation project. Chris Syed is going to discuss what a vendor can do, will do, and will not do for staff involvement and education. Stella Bentley tells us that the Indiana University Libraries are just finishing the planning for implementation of their automated system. They believe their plans are ready to go, and she will tell you what they are planning.

My function, after the others are finished, is to tell you a bit about the Champaign Public Library and Information Center automation project which has been in place for five years. I think I can then add to Stella Bentley's discussion by describing how Champaign planned and implemented, where we went right and wrong, and perhaps some specifics on what we wish we had done differently.
Syed: I should explain a little bit about my position with Geac. Basically, I am in charge of customer training for North America. The department is called education services and that is indicative of a change in the way we conduct training. At present, Geac has about eighty sites in North America, and there are five instructors to cover those sites. As you can well imagine, this means that we do not train every individual on staff. Geac’s procedure has always been to train the trainers. This has implications for the libraries; the libraries select who will train the library staff.

I will discuss desirable qualifications for trainers. At Geac, we are revamping our methods of training according to recognized adult education standards. We are not working to be a bunch of computer experts trying to get the customer to appreciate an elegant system. Rather, we want to provide a tool whereby you can introduce a new system as a way of benefiting your employees. Our introductory package for library managers is designed to bolster your employees’ confidence and the decision to go with a particular system. After the initial training we are available for consulting, and we assign an account representative (we call them project managers) for each site. This is perhaps a bit misleading in that the library probably calls its person a project manager as well, but the vendor’s project manager is available for consulting and to clear up misconceptions.

I would like to switch to a slightly philosophical approach for a moment. We consider that we are involved in a technology transfer process, involving hardware, software, and knowledge and attitude formation. The hardware and software are not really the concern of the education department, and I do not think they require an explanation. However, knowledge and attitudes are a part of training. By knowledge, I mean that we have to impart to key members of the library staff the skills involved in running the system and some rules-of-thumb for applying these skills. As far as attitudes go, they become more important the further down the hierarchy you get. We have to instill confidence in these skills and confidence in the system. Organizational security is primarily a library responsibility in that the vendor cannot convince the data entry personnel that they are not going to lose their jobs. In certain ways, however, the vendor can give library employees confidence in themselves and in their knowledge of the system and thereby relieve some of the insecurity. So how do we involve people in training and confidence building?

In his book, *Automating Library Procedures: A Survivors’ Handbook*, Ian Levy warns that you can err by introducing automation too abruptly and by guarding information. In other words, by keeping the plans secret, rumors start and these rumors are destructive to what we are trying to build. But involving staff is not an unmitigated good. You can involve people in wrong ways and at wrong times and you can involve them to the
wrong degree. Selecting individuals to work on committees or activities should be based on their qualifications.

There are many ways of involving people: they can be on the implementation committee, they can be the project manager for the site, they can be part of the formal training process, they can be designated as internal resources for the staff. Staff can be involved in public relations—e.g., newsletters or current awareness for the public—which can have benefits outside the system in a political realm; as a resource person for actual users; and most importantly, in ongoing operations in the system.

When the system is installed, it may be according to the specifications the implementation committee agreed upon, but things are going to change. For instance, you may want different types of reports. On an even more basic level, we often forget that if you have a printer there has to be an operator there to put the paper in it. Your staff need to learn how to use the system. So there are qualifications involved with each of these types of duties and some, though by no means all, include individuals’ communications skills.

Communications skills are especially important in staff training. Staff trainers also need technical knowledge, although it is not as important as communications skills or trainers’ positions within the administrative hierarchy. I think the staff member with the nonthreatening personality type is the type of person you want involved. There is no reason for appointing department heads to implementation committees except perhaps as a committee as a whole. The actual working decision should be passed by a smaller group and then run by the larger group to make sure no objections occur.

**Shaw:** I am here as a staff member of a library that has OCLC and is just getting a local automated system. I will be trained to use the local system by the people Geac has trained at MIT, and I have never met anyone from Geac before today. About four hours a day I work on OCLC inputting cataloging; I spend the rest of the day filing and searching the catalog or typing—or any other activity that does not involve working online. This should give you an idea of my main concern when people talk about automation. It is not the problem of meeting it with fear but living with it day in and day out. After you have become familiar with it, it can be dull; and I think that is a big issue when discussing automation. Once resistance has been overcome, boredom is the biggest problem.

Working with cataloging is more interesting than straight data input because there are more judgment calls, you can learn about what you are doing, and you are not just transcribing information from page to terminal. Catalogers do make mistakes, and that is a relief because it gives us reason to pay attention and something to do about it. Along with cataloging there is the circulation system.
It has been my impression overall (certainly my feeling in talking to people in circulation at MIT) that there can be overkill in training. While no one where I work has been patronizing of the employees, there has been a sort of summer-camp, team-spirit attitude among some people of "Come on, let's go get that database." They are also accompanying it with a lot of drama and preparing us with "This is earthshaking." Really, my impression is that automating circulation will not be that disruptive, except for the one-time bar coding project. Most of the clerical staff have been working with online information on OCLC before. Yes, we need the system training; we need to know what is going on. Those things are very important and involve the clerical staff. At the very least inform the clerical staff of the decisions being made keeping in mind that you are not dealing with children. We may not be professional librarians, but we are adults.

There are several things that have been said here that I think are important. I am glad to have heard professionals discuss diversification of duties so that people are not online all day. Doing different duties provides an idea of what your work means in a broader context. Also, I appreciated the discussion of ergonomics. I cannot stress enough the importance of the placement of a workstation, the lighting, and the chairs. When you are online for hours on end, these are very important considerations.

MIT is fairly good at maintaining staff morale. There is no detailed monitoring of our work. We keep statistics, we decide our own priorities, we know what has to be done, and we decide when we are best suited to do it. Some people do not work well in the morning, some people come in at 7 A.M., some at 11 A.M. Leeway in little things like that may look insignificant, but it is important if you are dealing with work that has enormous potential for boredom. You may decide that one day you only want to deal with LC (Library of Congress) copy, or you may only want to deal with original cataloging, and really it does not matter to anyone else. People should be allowed at least to make the decisions that affect only themselves.

A problem with automation is that quantity is the only way to excel. When you are in a data entry position, if you want to be promoted or considered for another position, there is a limit to how high your quality can be. If it is really bad you will be fired, and if it is really good, that's nice, but it cannot get any better. All you can do is more work—you cannot necessarily do better work.

On the subject of the summer-camp, "let's go get 'em" attitude, I do want to say that MIT is doing some things that are very good regarding group involvement. One of them is that we have to bar code all the books we are going to circulate and there I believe the plan is to close the library and get all of the staff involved—professional and nonprofessional. That may be fun in air-conditioned buildings.
Bentley: I would like to describe the planning process we have gone through at the Indiana University Libraries. It brought us to the point where just a little over a month ago we signed a purchase agreement with a vendor for the software to begin to implement the system. So, I cannot always give a full evaluation on how well we planned and how well we involved the staff. The current planning effort really went on for about three and a half years, and there had been earlier efforts that did not result in any system being purchased. So the staff had some experiences with gearing up and even going so far as thinking they were ready to sign and nothing came of it. We had to overcome some feelings of “This place is never going to automate and the rest of the world is going way beyond where we are.” An early goal was to involve the staff in planning and decision-making as much as possible and also to provide education for the staff. We were fully aware that some of our librarians and certainly most of our support staff had heard a lot about systems, but many of them had never seen one of those systems in action.

The initial thing we did was set up task forces—we had one on circulation, one on cataloging, and one on acquisitions—to investigate what they felt were the needs of the Indiana University Libraries for an automated system. I am talking about the Indiana University Libraries and automated systems—to serve eight campuses—and we involved people at all these campuses in the planning and decision-making. The system will be one central system to operate for all the campuses. They are spread around the state—Bloomington and Indianapolis being the core campuses—then six others as far as 200 miles away from the core campus. All will be operating from one central computer on the Bloomington campus. So in setting up these task forces both support and professional library staff from the various campuses were included. Travel is burdensome; we had many people spending hours in travel, let alone the time spent in committee meetings. Insofar as possible we tried to circulate documents. Whenever feasible we used teleconferencing with a statewide network for telephones and TV.

When these task force reports were completed and we had the committees’ thoughts on the libraries’ needs, we distributed drafts widely. Copies went to every department, and we gave people time to distribute them so everyone within the department had an opportunity to see the drafts. Then we set up a series of open forums where we could discuss these drafts. Usually the task force members themselves were in charge of the forum and not only did we have open discussions that people could come to, but this is one of the places where we used the statewide communications network so that people at the other sites around the state could listen to the discussion and ask questions with immediate answers rather than sending in a written question and waiting for an answer sometime later. As we finished with
these discussions, naturally some questions arose that we felt required further investigation so a few more task forces were developed to look at specific problems—e.g., labeling and linking, how we would handle the patron file, what the conversion effort really was. We have approximately 5 million volumes and only 700,000 records that are in machine-readable form so we do have a massive conversion effort ahead of us.

Next we set up a series of vendor demonstrations. We were able to get each of the vendors to come in for at least two days so that we could have four or five separate sessions. These were for as many of our staff as possible, and we also invited key people from campus administration and personnel from both computing centers to see these demonstrations. They needed an opportunity to see what the systems could do, to ask questions, and generally to get a good idea of what was possible at that time. We also arranged for a site visit for some key members of the library staff, faculty, administrators, and people from the computing center. They made an 800-mile trip to see a system which was actually operating and had an online catalog and circulation system.

While we have had a lot of staff involvement, a few decisions, for a variety of reasons, probably did not filter down as well as they could have. The decision was made that we would use the computer at Bloomington that was part of the administrative computing center. Even now there are questions about why that decision was made, and that was one area where more information should have been made available to people. That decision greatly constrained the systems we could bring in. Even though we had rough drafts of our RFPs (requests for proposals) and had recirculated them throughout the library, we abandoned the RFP process and actually entered into negotiations with a vendor.

Because we were going about the process a little differently from the classic RFP process, we had a whole new series of task forces that were created as we were negotiating with the vendor. Task forces looked at specific pieces of the purchase agreement. In many ways the purchase agreement was a joint effort—we wrote much of it and the vendor wrote much of it. There was a lot of discussion and compromises, and many of the compromises and suggestions came from the task forces that we had examining the document. Right now, as we are entering the implementation phase, again we have many task forces at work. They have representatives both of support and professional staff and people from the campuses. Again, that involvement is very important even though most of the books are on the Bloomington campus and most of the remaining books are in Indianapolis. People at the regional campuses have certain needs that must be expressed in the committee meetings, and we tried very hard to involve people from all levels of the library system.
In addition to circulating drafts of everything we did and having opportunities for people to express their concerns or interests, we also made an effort to include in the library's weekly newsletter at least a page on what is happening in the computerization effort. However, I recently learned that while we made enough copies for all librarians and support staff members to receive their own copies, some people are seeing it weeks and even months later. The copies really are not getting distributed. We are now looking at how to change the distribution system; we need to be much more concerned that the information is not only getting out but that it is getting out to all levels in the organization.

As we have reached the implementation stage we have created a team called the Preparation for IO Team. They have undertaken to inform people of what is going on and to let them know more about the system. We have had another round of demonstrations of the system and open discussions on each of the campuses. We are going to bring in a panel from another university that chose the same system a year ahead of us so that those people can tell our staff some of the problems and good things about the system and just how the implementation process has gone.

Drescher: At the Champaign Public Library and Information Center we have an online circulation system and an online patron access database through CLSI. We have been online in our circulation system for almost five years and with our public access terminals there has been complete database access for about a year. To prepare for this panel, I reviewed our experiences with the staff at our library. We found ourselves saying, "We don't remember that it was that bad." Then we went back and looked at the documentation and we remembered that it was that bad, but it had faded away and did not seem to be that difficult anymore. Automation has been readily accepted by our staff and our patrons for the most part. Our automation project has increased our ability to do library service so much better than we did before that it was all worth it. So for those of you who have been wondering, "Do I really want to do this?" I think we can offer you proof that it is indeed worth the effort.

We asked, "What do you remember that was the most difficult or the thing you wished you knew?" We decided one of the things we forgot to do most often and the people who got thanked rarely were our maintenance and building operations staff. For instance, our building is only six years old, and yet it was not wired for data cable. In order for us to go online we had a $10,000 wiring project that we did while operating the library. Circulation staff were standing at the circulation desk in the midst of electricians. Our building was not really designed very well for automation so we have power poles up and down the interior. Several library board members and patrons said, "You have this brand new building, it is
beautifully done, and you are already ruining it." We also had to reconfigure our phone system. We had to find furniture. We have patron access terminals that need to be accessible to the handicapped, to adults, and to children. To do this we had to look for ways to modify the furniture or to sell furniture that is only four years old without making it look like we were selling furniture in order to have an automation project. We finally modified the furniture we had, but redesigning the interior configuration, plus redesigning furniture, plus wiring, plus phones, plus power poles all involved our maintenance and building operations people first. Involving staff should not be just at the administration and personnel level. There are staff at all levels who should be asked to contribute to the decisions that will directly affect how they do their jobs.

When the Champaign library decided to go online we did not have all the technology that is available today. We had nothing on tape, and it was determined the only way we could get our records online was by manual inputting of all the material. We hired thirty temporary personnel, brought them into a library that could not accommodate thirty extra people, put them in front of terminals, and handed them the shelflist and said "Do the best you can." Not six months after we got that project in full swing, Mini-MARC became available to our library. We then shifted to Mini-MARC which meant that everyone had to be retrained and the whole work flow in the technical services department was changed once again. We used Mini-MARC for about eight months when Innovative Interfaces announced their little black-box access between CLSI and OCLC. We were faced with reevaluating the work flow and retraining all those personnel to do the interface through OCLC and CLSI. All this happened within a time span of about eighteen months. The coping skills that those people acquired were enormous, and we all had terrific respect for them. One of the things that happened in this constant semicrisis and then changed was that people developed a sense of teamwork. We were no longer so much afraid of the next crisis (we knew there would be one) we just had not figured out what it would be. I think one of the best examples of a time when we thought we had reached our limit of patience was when all the power poles had been installed, and we were ready with our patron access project and found that our terminals were late in delivery. When they finally showed up we were ready to have a kind of open house on patron access and then discovered the electricians had forgotten to put the plugs in the poles.

As a public library, we had all kinds of materials that needed original cataloging—e.g., toys, video recorders, 16mm projectors. We found ourselves heavily involved in original cataloging that we had never anticipated. Our technical services department spent an enormous amount of time in reupping their skills in original cataloging to try to figure out a
standard format for a puzzle and they did it. We share our standard formats with a lot of people now, but that was an implication of automation that we had not anticipated. We figured that we would use someone else's cataloging but we had too many things that were not typical of the average library so we had to do it ourselves.

One of the best examples I can give of how important it is to involve the staff at all levels is when we had to figure out a way to indicate which books were online so they would not come up again for inputting. We on the administrative staff had wonderful ideas about how someone could check them or open the back of the book and see if it were online. One of our shelvers had the solution, "just put a little star on the top of each book and then I could walk down the shelf and say, 'there's one without a star' and take it upstairs." So the entire shelving staff became the people who tried to find what was not online. It became almost a contest for them to find things that did not have blue stars.

We asked for two representatives from each department to help with the inputting. We insisted that the supervisor of each department be one of those two for a number of reasons. We wanted supervisors to have direct manual input into the database. Also, we wanted them to know which decisions were being made, how they were being made, why they were being made, and we wanted them to convey that back to their group. We also asked for another employee, in addition to the supervisor, from the department, so they came as a team. They were then responsible for conveying to their department what was being done and taking the department staff's concerns back to the people who were doing the inputting. It worked well in helping us to make the changes from the manual inputting, to Mini-MARC, to OCLC. We needed that direct line of communication with "You won't believe what they're doing upstairs again." The staff became much more aware that there were a lot of changes being done, but that people were involved in those changes.

So where did we go wrong? I'll tell you one good example of where we made a serious mistake. We had decided to put the bar code label and the date due slip on the back cover of the book. We did this with much discussion. We were told it would never work: the laser scanner couldn't read through the plastic; people would rip off the bar code labels; they would get marked up; and so forth. We could find very few other libraries that had done this, but we decided to take a chance. We went online with our circulation system and we sat back and waited to see what the public reaction would be.

Everybody thought it was fine. We had reregistered people four months in advance so that they all had new cards on the day we came up. We had some demonstrations. We had shown people how it was going to work. They were fascinated by the laser scanners. And for about three
weeks we sat back saying, "Not bad." Then readers of paperbacks started throwing suggestions in the suggestion box. We had placed the bar code label and date due slip where readers couldn't read the paragraph on the back of the book to see if they had read it before. We had been preparing for some sort of computerphobia, and what we got was "Move the label." For paperbacks now, wherever the paragraphs appear, we put our labels in the least obtrusive spot. Our problem was in trying to be consistent for our circulation staff. The problem with the paperbacks is really the only serious complaint we had about coming up online with the circulation system.

We brought up our patron access system a year ago and that project brought in a whole new group of people. They were most often public service representatives, and we found hidden teachers on our staff who wanted to teach the public. We set up a task force that included a representative from each department to design an instruction sheet. We designed workshops and a script that each staff member could use so that each patron would get the same story and the same examples, and we involved all staff members. We even had the maintenance crew trained to be teachers. As time went on, some people said, "I really don't like to do this so much anymore," and we let them drop off. The people who liked doing the teaching the best were the technical services staff and the original inputters because they really owned a piece of the database. They enjoyed going downstairs and having someone find something on the screen, and they could say "I put that in there and they found it." The technical services people really enjoyed being part of that "public" project.

Almost by osmosis, people in the building and in the library system said, "I want to be involved." I didn't have the problem, over the long haul, of people saying "I don't want to do it." It certainly took some convincing but peer pressure really does work. If you get enough people saying, "I think this is a great idea," and if you can get them to understand that everyone is in this together and that we all own a piece of the database and want to teach the public, they really will want to do the kind of project that you're looking for. It does not work to say, "It will make your job easier," or "The public will like you better." Both of these are untrue.

We find now that we have a difficult time remembering whether we were tearing our hair out, or whether it didn't work, or what kind of nitty-gritty decisions we had to make. One piece of evidence we have is a Rolodex file of instructions and documentation rewritten by four staff members. They decided that they couldn't read the documentation and instructions, didn't like the format, and the information wasn't easily accessible because you had to keep flipping through the book. They put the instructions on Rolodex card files and placed them at all the service desks. It was not my idea. It was our head of circulation's idea. It works
well, and when they gave it to me to bring to the clinic, I said, "Are you sure I don't have to bring it back?" They said, "No, that's okay, we don't need it anymore," but it was a wonderful crutch when they needed it.

I would like to begin the discussion by asking Barbara Shaw about a comment she made today. She said that one of the things that she rather resents about the automation is the loss of her supervisor. I had never heard that comment before and I would like to hear a little more about it.

**Shaw:** I don't think I'm unusually fond of my supervisor. He's very nice and he is one of those communicative people Chris mentioned. When I mentioned the loss of my supervisor I meant the loss of my supervisor to committee work. In our section we all enjoy whom we work for and whom we work with, which is important and one of the reasons I'm happy there.

About a year ago, committees started building, and while I don't think any one person served on all of them, it seemed like they did to us. There were people we wouldn't see all day for two or three days at a time. One way that people talk about involving staff in library automation is putting people on committees left and right, and there's got to be a limit to that. The larger the committee, the longer the meeting takes, because more people think they have something to say.

I don't know that it was unusual that we wanted our supervisor back, though there may be places that don't want their supervisors back. There was one good thing about losing my supervisor to the automation committees. I didn't get a whole lot of training on the system because my supervisor was too busy, so the person who had been there right before me trained me. This gave him an opportunity to do something new and different and fun and to try out his supervisory skills. Then there was a bit of a turnover in the staff, someone else came on behind me, and I trained him. It was fun. So the one good thing about losing your supervisor to committee work is that it diversifies your own duties and gives you a bit more responsibility.

**Bentley:** Given the number of committees and task forces we had going at Indiana, that certainly is a real cost of the process. We never stopped and figured it out, but it is a tremendous investment of personnel time at all levels. In our case there is not only the time they're in the meeting, but for many people there's a lot of travel time involved, too. Some of them are spending two hours on the road for every committee meeting that they had to attend. I don't think we would want to do it any other way because it is essential to get these people involved, but it is something you have to be aware of, that there are going to be things that you have been doing in your library that just can't be done or have to be done by other levels of staff in order to have this kind of involvement.

**Drescher:** Jane Burke said if you were going to be involved in a consortium that that would double the time spent, and our implementation involved
forty-two other public libraries in a consortium. The investment of time and taking people away from their work probably is worth it, but it doesn’t look like it. The reason that Barbara’s comment struck me so much is because I had never considered that aspect at all. We hauled the desk people out of each department, put them on committees, and told them this was the priority of the library at the time. I wouldn’t be surprised at all if there were people at the Champaign library who felt exactly the way she does. I wish I had known that before I started my automation project. I probably would have done it a little differently.

I wanted to ask Christopher a question about the vendor telling the library how to involve its staff. What do you tell a librarian who is ready to implement about whom to pick, and how to pick, and how many committees and task forces?

Syed: It’s only in the last month or so that we have even heard the concern expressed by a library. We have negotiated in contract talks on how we as a vendor would help a library involve its staff.

There are many different ways and many different levels of involving people, and there are many good reasons for involving people. Their position within the hierarchy is one of those good reasons. But position may be more important on the policy committees—the decision-making committees. On the other types of committees, personality factors, communication skills, and that sort of thing should override the position within the hierarchy. No matter whom you assign to these committees, you are going to lose some talent from the work group and that is to be expected.

Shaw: What are some of the other means of staff involvement besides committee work?

Syed: One way that we haven’t touched on is the public interface. Someone has to do newsletters and handouts for the public. Someone should be doing an internal newsletter to brief the staff on all the activities of the committees. There is the implementation committee and its subcommittees. It is not necessary for every department head to be present at every meeting of the implementation committee. People can serve as trainers.

Especially in a university library the so-called lowest level of staff are quite apt to be university graduates. That separates librarians from the nonprofessional staff by one to two years of library school. Staff at all levels have agile minds. The nonprofessional staff are trained in chemistry or physics or something; they are going to pick up on automation if you don’t scare them off. Therefore a lot of the activities that we try to restrict professional librarians to can be delegated. The staff can feel confident about automation, thinking, “Oh, the night shift supervisor now knows how to run this computer; it can’t be that difficult ‘cause I worked with that guy all the time.”
Bentley: We used a variety of methods to select people for committees. We had the administrative level from all the libraries recommend people. We had people volunteer. Sometimes if we got a task force or a committee together and realized that there was some level of work or library or constituency that was not represented, we either went out and solicited somebody or again looked at the list of people who said they were interested in serving on groups. If it was dealing with labeling and linking, the people who would be dealing with those tasks—in circulation or in the processing department—would be on the committee to make recommendations. These recommendations then are coming back to a sort of an implementation committee that consists primarily of administrators.

Drescher: We had a committee do something and then had it reviewed by a larger group. As we were readying our patron access process, a person on our library staff suggested that we really ought to check the real world to see how we were doing. We thought we had the best instruction sheet, the best script, and the best workshop we had ever seen, but we were the only ones who had seen them. So we had a kind of closed open house at our library for our families. We tried to train them on the touch and keyboard terminals. We used the sheets that we had designed (that were perfect) and we revised them the next day because there were some real problems. Mostly it was library lingo or we had made assumptions that they would understand the keyboard, and, especially for the touch terminals, our sheets were just bad. That gave us a chance to bring in children, young adults, elderly people, and middle-aged people. Our family members had a good time watching us trying to teach them, and they asked us all those questions that we either didn't think about or didn't know how to answer and had ignored. In particular, they all wanted to do subject searches, and we were desperately hoping they wouldn't want to. That kind of pretesting takes time and guts and it will probably ruin some plans that look so wonderful. In the end it makes for a much smoother transition.

Shaw: When our circulation staff was trained to use the circulation system, one of their concerns was that nobody can predict what a patron is going to ask about the system. Not only, "Can I get this piece of information or that piece of information?" but "What specifically can't be retrieved?"—e.g., a patron's history of overdue books. There was a list of bizarre questions people came up with and it was posted in the circulation department and patrons were invited to contribute to it anonymously. It is still up; it has become quite lengthy and is a very popular item.

Syed: There is also a tendency to worry that someone below you might possibly know more about an aspect of the system than you do. Management classes tell us that advancement should be because of administrative ability and not technical knowledge. We shouldn't fear that someone may know a little more about how to check out books than we do. And we
shouldn't try to bog ourselves down trying to know everything. One thing that you learn very quickly in the computing business is that there is always a junior programmer who knows a heck of a lot more about systems than you do. Instead of being threatened by that, you should be proud to have such a person on the staff.

**Drescher:** What we had mentioned a while ago, too, was the idea that perhaps some training can become excessive. I didn't have that experience in our situation, but I was wondering if Chris Syed wanted to discuss whether Geac excessively trains people or whether you even considered that aspect.

**Syed:** I don't know that we can be accused of excessively training, but we have adopted two different approaches—one in Europe and the United Kingdom (where we offer individual, one-on-one instruction), and one in North America (where we have structured courses of rather limited duration). The problem is when the needs of the customer don't match the duration of the course and that can work in both ways. We can offer—as we did at MIT—ten days of circulation training; or on another site, we could offer four days of circulation training. Either of those could be too long or not long enough. It depends on the expectations at the site and the actual need to know of the people that are involved.

**Question:** After we went online, the circulation staff members who were trained found better opportunities in banks and other facilities—especially in that they weren't dealing with the public. How can we talk with managers or work with managers who have this constant turnover problem after people have been trained to use computers?

**Syed:** I don't know what you can do to minimize turnover, but one of the things that might help is to make sure that the stress factors involved are limited. To limit stress, make sure that the people who feel that their jobs are threatened, that they may have to acquire new skills, or that they may be moved are given the tools whereby they feel confident in their ability to work with the system. From personal experience working in a library, I remember how the woman who used to phone everyone and tell them that the books they had requested were available suddenly had all that printed up for her. She had to go off on an extended holiday to try to cope with the change.

**Drescher:** From a public library experience in this community (Urbana-Champaign), we have a very high turnover rate because we hire so many students, part-time students, or persons attached to a spouse at the university. We are used to the very high turnover rate, and our solution to the problem is to make our training as specific and easily done by our own in-house staff as possible. We don't try to prevent the turnover problem except by trying to make a pleasant workplace while they are here.
Shaw: In the large office I work in, which is cataloging and acquisitions, maybe 50 percent of the people have held the job that I now hold. There is evidently considerable upward mobility. One reason we all like our supervisor so much and do not want to lose him to committee work is that he enjoys training people. He prefers to hire people who are going to move on soon because he thinks they are fairly intelligent and because they are more fun to train. He then gets to train someone else when they leave.

Question: What role did the director play in the planning process?

Bentley: Our director has served as an ex officio member of the general planning group, both when I chaired that group the first two years and when we hired a systems officer who chairs that group now. In both cases we were reporting regularly to the director what the steps were and how we were proceeding with the planning. I would say, as with most things going on within the IU libraries, the director is generally overseeing it and giving it direction. She certainly has had a large role on the campus in both obtaining the funding—which we finally got this year—and providing a leadership role with the key faculty that have to be won over. (Some of them have already told us they want those cards there forever in the card catalog.) She is aware of and approving the planning and implementation within the library but she is not directly involved on a day-to-day basis.

Question: At any point did the director say, “No, I don’t agree with that; we’re going to do it some other way”? What was your reaction?

Bentley: We have a good working relationship with the director and we kept her informed through the steps. It’s not as if something were well underway and then she said, “Don’t do that.” If she objected, it happened early on and we didn’t have to undo something that we had spent a lot of time doing.

Comment: I have a comment on the effect of the first press release following the information that the library is going to be automated and the kinds of questions that patrons ask even of support staff who work with the public. The questions can be very specific, and unless the support staff knows exactly what’s going on, it can grow very tiresome saying, “Oh, I don’t know.” It would be very useful at least to have something to tell patrons or to be able to say, “This is what we can tell you so far.”

Question: I have a comment and then a question. The comment concerns the approach to training. At each of our libraries we have three training sessions. We train all staff then we expect them to build upon these training-sessions skills. But not all staff are entering data, so they have trouble keeping up with these skills. Their other duties do not seem to decrease any, and it is hard to find the time to practice on the terminals.

My question is about the committees that were used during the implementation process. Do any libraries continue these committees after the
system is up or are they just disbanded. In other words is there evaluation or review—i.e., is this system doing what we thought or what we expected?

**Drescher:** We disbanded our committees in that they did not meet as actively as they had in the past but they do still exist. For instance, we recently revamped the instruction sheet for patron access based on the feedback we received over eight or ten months. The committee that was assigned to design the instruction sheet originally met again to do it over. So, at least for staff working on patron access, yes, we did keep the committee active. For our database circulation system, no, we did not keep the committees.

**Question:** To follow up on the earlier question, since IU has gone through such a large planning process I would be curious to know how long you think the committees are going to be functioning. Will they be involved in evaluating the success of the implementation?

**Bentley:** The implementation itself is going to be a very long process. While the software will be loaded later this month, our actual database load is not scheduled for almost a year. Even if everything should run according to the timetable, final acceptance is not even due until December 1986 so many of these task force groups will be very involved for the next year and a half and probably even longer given the type of process going on. We decided not to have a tight timetable that we knew we could not stick to. And we will probably create more task forces as we see needs for them.

**Drescher:** We had task forces or committees that went over the broad spectrum of library services. Now we have little committees in each department coping with more of the basic details of handling problems or having expectations that were not met or thinking we understood doing something one way and we didn't. I would say we are functioning with the circulation department as a committee meeting together and saying, "This workflow procedure does not work. How are we going to do this?"—then announcing the department's conclusions to the rest of the library system so we all understand what we are doing.

**Comment:** Whether or not the same committee exists after the implementation, some sort of monitoring or enhancement committee should exist to exploit the system once you have it. Also it seems that each library works on reformatting the instruction manual. Should librarians insist that vendors provide useful documentation so that library staff can work more efficiently or intelligently?

**Drescher:** I agree. However, one aspect of doing the revisions in-house is that the library can add its own equipment with its own specific instructions and locations. Documentation becomes more familiar to the staff when they read that they are going to be using the terminal on the small green desk right outside the door.
**Question:** I'm interested in the subject of monitoring. It seems that in a library that is doing a lot of its own data entry this could become quite an issue. Are there automated systems in libraries that have the built-in capacity to monitor data integrity, input errors, that sort of thing?

**Syed:** That is a rather touchy issue with me and has been used by unions in strike literature in the past. I think there are certainly checks on data integrity in our system and in other systems as well.

**Shaw:** I have never personally been monitored. Checking on the quality of the data entry at MIT has never really been possible until the cards come in from OCLC. When Geac comes up we can be checked at the end of the week. But it has, as far as I know, never been a significant problem. There are people who have been highly error-prone at MIT and they have either not been promoted or they have left. There is one problem that you mentioned. I had great trouble when I first started separating out the letter l and the one, because on the typewriters we used there was no one, we had to use the l. Then you go to the keyboard and have the ls and the ones. From our test load on Geac it became apparent that confusing the two characters is one of our problems and those are all going to have to be corrected manually. That comment leads to another, which is that we expect our automated systems are going to create at least one and possibly two more jobs. Nobody's talking about losing their jobs at MIT; we're looking for more people.

**Question:** Can you tell what positions will be created?

**Shaw:** I'm not sure what the titles will be, but they will primarily involve online editing. We expect to have a lot of problems when the system first comes up—errors we never knew we made.

**Question:** Are there others in the room that considered hiring a database manager or who hired a database manager once they came up?

**Syed:** Edit and verification jobs are created which may mean people are shifted or the work flow changes. It is encouraging to hear that automation is not resulting in a lack of jobs but perhaps in responsibility shifts although that can be just as stressful to the employee. For example, you need people from all different levels for building authority files; you need people who know about subject headings—professionals.

**Drescher:** As a public library director—and I think this holds for other public libraries—my needs are considerably different from those of academic libraries. I've heard a lot today about the authority files and original cataloging, but we buy almost 90 percent of our material preprocessed, and the only thing we're running through OCLC is anything our jobber will not do. So as soon as we were online and had the database established, we deleted a professional staff position—the cataloging position—by attrition. We also deleted two part-time clerical workers. Over the last five years
we have lost nine FTE employees by attrition. I hear a lot of people say, "Now, you're not going to lose your job," and that's true in some cases. In our case no one lost a job because of automation: we had the luxury of waiting. We also had the semi-luxury of being in a community where turnover is high, so we knew that people were not going to be here for fifteen or twenty years. But as soon as we weren't typing 4000 overdue notices off of microfilm and manually filing all the little cards for reserves, and sending someone out to the shelves to find them, that was two FTE employees right there that we did not need. We found places to shift some people, but the old jobs with the manual systems just were not there anymore.

Comment: There are two things that people may need to remember. One is that the expectations of the patrons go way up when you get an automated system. If patrons find an error they expect the error to be taken care of that day. Libraries really need to have people trained and on board who can do that. The other thing to remember is that you will be maintaining copy, volume, and holdings information in the circulation portion of the systems that you may not have needed in a manual system. When a patron asks about an item at the circulation desk, we want to have holdings information in the system for that copy or that volume. Both of those things—the ability to correct the database quickly and to keep up with holdings information—often necessitate some extra positions for database management. At the University of Illinois there is a professional who supervises both units, both the people who do the inputting are LTAs and library staff.