Appendix E
Received AUG 20 2014
Proposal # 15-2-SAG

Full Grant Proposal
Library Services and Technology Act FFY 2015

This form is available for download in Microsoft Word on our web site via: http://www.oregon.gov/osl/LD/Pages/LSTAcomp.aspx. Proposals not meeting the following conditions will be returned. Use 12 point Times New Roman with one inch margins. Hard copy must be **single-sided**. Do not change the words on this form. The deadline for receipt of the full proposal is **5:00 pm on Friday August 15, 2014.**

Part I: General Information

1. Project title:
A clean slate: Increasing cataloging capacity in the Sage Library System

2. Applicant: **Sage Library System**

3. Mailing Address:
c/o Baker County Library District, 2400 Resort Street, Baker City, OR 97814

4. Contact person: **Beth Longwell** Phone: **541-962-3867**

   Email: **blongwel@eou.edu**

5. Fiscal agent (if different than applicant): **Baker County Library District**

6. Project URL (if any): **http://catalog.sage.eou.edu**

7. U.S. Congressional District: **2**

8. DUNS number: **193440039**

9. List geographic target area to be served by the project: **Eastern and Central Oregon**

10. Estimated number of persons benefiting from the project: **136,000**

11. Description of persons benefiting from the project:
All patrons of the Sage Library System

12. List partnering organizations. All partnering organizations must also sign section IV.1. See instructions for guidance on partners versus participants.

None

13. Project abstract (one paragraph):
The Sage Library System covers half of the state of Oregon, including over 70 libraries of various types. Unfortunately, the varying skill levels in the system paired with growth in the consortium have resulted in an inconsistent bibliographic database. This frustrates patrons who use our online catalog and makes it difficult for them to find what they want. Sage seeks funds to hire a full-time Cataloging Specialist to train Sage members in cataloging, clear up database inconsistencies, and lay the groundwork for consistent cataloging so that Sage can better connect its patrons with the items they want.

14. Provide the text of the single most relevant goal from the *Five-Year State Plan 2013-2017* that will be addressed by the grant project.
GOAL # 2 – Use technology to increase capacity to provide library services and expand access

15. Briefly describe how the LSTA project will continue after the grant ends, especially noting local support.
Sage Library System receives the bulk of its revenue from member dues. We are hoping that the foundation of training, documentation, and development of a train-the-trainer model proposed in this application will preclude the need for the Cataloging Specialist position past the grant period. However, as Sage grows, we recognize the need for additional staff and resources. The User Council will review how much further cataloging assistance Sage needs. If deemed beneficial, the Council may increase membership fees to retain a permanent Cataloging Specialist.

16. List letters of support for the project (name, affiliation) that are attached to this application. Do not include letters from project partners listed in #11.

- **Heidi Florenzen, Reference & Internet Librarian, Hermiston Public Library**
- **Heather Staten, patron, Hood River County Library District**

PLEASE FILL IN THE FOLLOWING INFORMATION ABOUT THE ANTICIPATED LENGTH OF YOUR GRANT PROJECT:
(Check applicable boxes)

THIS IS THE	☐ 1st YEAR	OF A	☐ ONE YEAR GRANT PROJECT
	X 2nd YEAR		X TWO YEAR
	☐ 3rd YEAR		☐ THREE YEAR

For projects that are multi-year be sure to include an estimate of the funds anticipated to be needed for the future years in the budget discussion.

THIS IS PRIORTY 1 OF THIS ORGANIZATION'S PROPOSALS

Part II: Project Budget

Proposed project budget (use this format only – do not alter):
(Double click on the table to enter data. Before closing the table, be sure to scroll to the top of it)

Item	Local Cash	Local In-Kind	LSTA	TOTAL
Personnel		$6,400	$28,602	$35,002
Benefits		$3,200	$14,782	$17,982
Travel	$700	$2,240	$1,120	$4,060
Equipment		$1,000		$1,000
Supplies		$1,000		$1,000
Contractual	$11,000	$2,400	$3,200	$16,600
Library Materials				$0
Total Direct Charges	$11,700	$16,240	$47,704	$75,644
*Indirect Charges***				*$0*
Total Budget	$11,700	$16,240	$47,704	$75,644

*** If requesting indirect charges, you MUST attach the relevant portion of a current federally-approved indirect cost plan.*

Proposed second year LSTA amount: **N/A** Proposed third year LSTA amount: **N/A**

Part III: Project Narrative
(Attach additional pages. See the criteria for grant proposal evaluation in the Grant Guidelines as well as the Grant Application Instructions for more information on this section.)

A. Background of Applicant (describe the agency's ability to undertake this project)
Sage Library System is a unique multi-type consortium including public, academic, K-12, and special libraries. It began its life as the Pioneer Library System with a few libraries in Eastern Oregon but now serves over 70 institutions in 15 counties across half the state. The consortium includes everything from Eastern Oregon University to the tiny Crane Union High School, stretching from Hood River County in north central Oregon to Malheur County in the southeast. These libraries share a catalog and database, courier service, circulation and cataloging policies, and technical support staff. Sage had over 137,000 registered borrowers in 2013-14, had access to nearly 1.5 million materials, and circulated almost 1.28 million items. The consortium is governed by a 13-person User Council composed of library staff representing various types and sizes of institutions.

Sage has a strong history of collaboration. Our consortium includes several small, rural, and/or isolated libraries, with varying patron needs, budgets, and expertise. Members have found that we can achieve far more together, especially given that our largest public library serves only 26,000 patrons. Collaboration extends to two main areas: a shared courier and integrated library system, with the requisite common policies and procedures to make those systems effective.

We are well known for our unique approach to courier service. In the past, Sage has used everything from garbage trucks to bank delivery vans to staff members traveling on personal time to deliver materials among libraries. Now, Sage relies mostly on the Orbis Cascade Alliance

courier, the InterMountain Education Service District courier, local couriers for our larger library systems, and Stamps.com for our more remote members. Last year, Sage members lent nearly 87,000 items to their fellow libraries. We are grateful for the kind annual support the LSTA Council and Oregon State Library Board of Trustees has given for our courier system.

The consortium perhaps is best known statewide and nationally as a pioneering user of the open source integrated library system Evergreen. We adopted Evergreen in 2009 and 2010, migrating from the proprietary Millennium ILS, thanks to additional support from the Oregon LSTA grant program. Millennium was proving too costly for our small and less-capitalized members to bear. Since migrating, Sage has benefited both financially and technologically. Evergreen has proven much less expensive to operate, even factoring in additional staff support. The system has taken advantage of Evergreen's openness, funding developments to improve the software for Sage members and other Evergreen users.

Sage has grown quickly in the last several years. In 2010, the consortium merged with GorgeLINK, which included libraries from Hood River, Sherman, and Wasco Counties. Other individual libraries, such as Klamath Community College, also joined recently.

Last fall, Sage did an extensive strategic planning process, its first in over a decade. The process was instigated by Eastern Oregon University's move to the Ex Libris ILS, required as part of its membership in the Orbis Cascade Alliance. EOU previously acted as Sage's fiscal agent, a role now kindly taken up by Baker County Library District.

B. Detailed statement of problem

With such a diverse membership comes inconsistency: members have varying technical competency, especially related to cataloging. Sage's disparate geography makes in-person training difficult and costly. To compound these problems, Sage's recent growth, especially the 2010 merger with GorgeLINK, has presented issues. New members' records are imported into the system. Unfortunately, those records may have been cataloged to different standards. Even with proper processing of new records, problems persist.

There also are issues with current members. Some members have trained catalogers and others do not. Often, staff changes can result in untrained staff members entering records simply because there is not time to train people properly. Libraries also can be inconsistent in sharing Sage's established cataloging policies and procedures with new staff.

These myriad issues have resulted in an unkempt bibliographic database; it includes duplicate records, records entered to varying metadata standards, and flat-out errors. Such errors frustrate not only staff, but patrons. Our users may not be able to find items they want, they may place a hold on a duplicate record of another library when they could have gotten the item faster from their home library, or a record for a particular item may not contain enough information for a patron to determine if they want it.

The switch to Resource Description and Access (RDA) cataloging standards from the previous standards looms over these factors. Training staff at 70+ libraries in RDA standards will be no small task, especially when many of them have only a loose grasp on current standards.

Sage is making efforts to correct these problem. Thanks to a 2013 LSTA grant, we contracted with an outside company to de-duplicate our database and make current records compliant with RDA. In addition, the Sage Cataloging Committee - composed of library staff from around the consortium - has rewritten the cataloging procedures and standards, including implementing a tiered system of permissions and access for catalogers. Such tiered access will help avoid untrained staff entering records. In addition, the committee has identified several free online trainings, which staff can take to increase their cataloging permissions.

Despite these efforts, we need further assistance. Sage has only two staff devoted to the consortium itself: a Systems Manager and a Systems Librarian. Both are focused on Sage's technical infrastructure (servers, software maintenance, permissions, problem tickets, etc.) rather than cataloging. All other consortium responsibilities are carried out by volunteers from member libraries. Some of those volunteers on the Cataloging Committee have done a great job formalizing procedures and creating new tiered cataloging structures. However, these volunteers have jobs at their home libraries and lack the time to spearhead a project of this magnitude.

C. *Describe the proposed solution that the project will implement. Indicate the project goal, and the quantified objectives that will be used to measure whether the goal is accomplished. Describe the activities that will be undertaken to meet each objective. (include timeline)*

Sage seeks funds to hire a full-time cataloging specialist for two years. This individual would oversee a consortium-wide project to clean up Sage's bibliographic database, standardize policies and procedures, and ensure that cataloging staff are trained properly to input records in a manner consistent with those standards and ensure that patrons will be able to locate them easily.

The goal of this project is to **enable Sage Library System patrons to easily find and request the items that they want**. This project specifically focuses on the staff side of that goal: improving the catalog at the point of entry. Front-end staff who work directly with patrons can only do so much if the database itself is poor. Other staff around Sage are working on tools and presentations to help members effectively show their patrons how to use the Sage catalog. Our objectives with this project are as follows.

1. *Staff at all member institutions will be trained in proper cataloging standards, including RDA.*
   The main focus of the Cataloging Specialist will be ensuring that Sage cataloging staff are trained in proper metadata standards. Trained staff, who can enter records properly into the system, together with archived and accessible trainings materials, will reduce errors in the system, precluding the need for extensive training in the future. To ensure that all staff are trained, policies and procedures will need to be standarized systemwide. The Cataloging Committee, and to a lesser extent the User Council, will be involved in guiding and helping prepare these trainings and policies.
   i. Identify and take additional RDA training, if necessary.
   ii. Work with the Oregon Library Association Technical Services Round Table and other resources to find sample policies and trainings that could be emulated.
   iii. Revise Sage cataloging policies and procedures, emphasizing currency and consistency.

iv. Update cataloging documentation on the Sage wiki, especially tutorials on basic cataloging tasks.
v. Develop different levels of training for different skills levels including copy cataloging, original cataloging, downloading records, MARC, and RDA.
vi. Offer at least three in-person trainings in each Sage region.
vii. Record trainings and webinars and make them accessible online.
viii. Adapt the tiered cataloging permissions to ensure that staff trainings are acknowledged and each member library has permissions based upon their training and skills.
ix. Develop specific train-the-trainer sessions for each Sage region cataloging expert.
x. Publicize availability of training materials to Sage staff and other libraries.

2. *Sage system and cataloging staff will spend 75% fewer hours correcting database records.*
Members with more trained cataloging staff, as well as Sage's Systems Manager and Technical Services Specialist, spend large amounts of time correcting improperly cataloged records. Many of these errors were corrected with the 2013 de-duplication grant. However, some errors remain. The Cataloging Specialist will work to eliminate these errors through database work, the training identified above, and the following activities.
    i. Working with Cataloging Committee, identify errors in records, especially those affecting patrons' abilities to locate items.
    ii. Working with Sage staff, conduct batch fixes to problem records.
    iii. Identify members with disproportionate numbers of errors.
    iv. Train identified members in proper cataloging techniques.
    v. Communicate regularly with cataloging staff to point out noted errors, with tips on how to fix them.
    vi. Formalize the regional cataloging experts system to provide additional support for cataloging staff.

3. *Patron satisfaction with the Sage catalog will increase by 25%.*
Ultimately, cataloging is only effective if it facilitates patrons finding the items they want. Sage will soon be conducting a patron satisfaction survey. We hope to improve on the findings of this survey related to the catalog specifically. The above two objectives will assist with meeting this objective as well as the activities listed below.
    i. Working with Sage staff, analyze patterns of patron search behavior.
    ii. Working with the Sage Development Committee, investigate other Evergreen catalog installations to identify patron-friendly modifications in scoping, searching by format, browsing, series identification, and others.
    iii. Investigate third-party products, such as LibraryThing for Libraries, that could improve item discovery for patrons.

Timeline
We are behind on our original project timeline. The position was posted on June 6, 2014, and closed on June 30, 2014. We received five applicants. Overall, the applicant pool was quite strong. Three candidates were interviewed. We currently are checking references. We anticipate someone starting in early to mid September. In order to provide flexibility, several Sage libraries have offered office space for the Cataloging Specialist. This way, the successful candidate may not need to relocate to accept the position. The rest of the timeline is as follows.

- September 2014: Position starts. Meet with key Sage staff, committees, and the User Council. Review cataloging documents. Review results of de-duplication project. Identify needed training.
- October-December 2014: Identify problem areas in database. Take identified training. Begin designing basic and intermediate cataloging training. Begin working with Cataloging Committee to revise policies. Finalize basic training.
- January-March 2015: Begin recording webinars. Finalize policies and procedures to present to User Council. Work on batch-fixing problem areas in database. Offer live online trainings. Begin investigating other Evergreen catalog setups. Prepare tutorials. Work on batch-fixing problem areas in database.
- March-June 2015: Record more webinars. Offer basic and intermediate trainings in the regions (winter trainings in Sage are infeasible, hence this timeline). Prepare more tutorials. Research training for RDA. Work on batch-fixing problem areas in database. Follow through on Evergreen catalog fixes.
- July-September 2015: Offer basic and intermediate trainings in the regions. Begin planning for more intermediate and advanced trainings, including RDA.
- October-December 2015: Finalize intermediate and advanced trainings. Record webinars. Write tutorials. Work on batch-fixing problem areas in database.
- January-March 2016: Record webinars. Write tutorials. Train regional cataloging experts remotely.
- April-June 2016: Offer intermediate and advanced trainings in all Sage regions. Train regional cataloging experts. Finalize documentation.

Given our late start, the timeline may extend as far as September 2016.

D. Budget narrative

Sage Library System's current fiscal agent is Baker County Library District (BCLD). BCLD is an active and long-time Sage member and is located centrally among Sage member institutions.

The funds we request primarily are to hire the Cataloging Specialist. We also request some funds for travel related to the Cataloging Specialist's work as well as funds so that member libraries can hire substitutes to cover training times. Details of expenses are below.

- *Personnel and benefits:* We request funds for a full-time Cataloging Specialist, to be hired through BCLD. Based on BCLD's salary scale for catalogers, the annual wage would be $28,602. We understand that this wage may seem low to our colleagues, but it is commensurate with rural libraries of our size. Benefits are calculated at a PERS rate of 14.84% as well as an estimate of $9,500 per year to cover health insurance. We anticipate that staff from all Sage libraries will be donating approximately 400 hours toward this project and its components. Assuming an average wage of $16/hour, this results in a $6,000 in-kind donation of personnel time, with commensurate benefits.
- *Travel:* The Cataloging Specialist will travel throughout the Sage service area to deliver trainings. We assume 2,000 miles of travel at the current federal mileage reimbursement rate of $0.56/mile, totaling $1,120 requested of LSTA funds. Staff will travel to trainings.

Assuming 4,000 miles of travel for Sage staff, that gives an in-kind travel contribution of $2,240. Sage will contribute $700 from its own travel budget to pay for hotels.

- *Equipment:* BCLD or another Sage member will contribute a computer for the Cataloging Specialist to use, depending on where s/he chooses to locate.
- *Supplies:* BCLD or another Sage member will contribute basic office supplies for the Cataloging Specialist to use. Sage itself will assist in paying for copies of training materials, manuals, etc.
- *Contractual:* Many Sage libraries are very small, and having staff away for training requires closing the library. We therefore request $3,000 for those institutions to hire substitutes to cover during training periods. We assume 200 substitute hours at $16/hour. BCLD or another Sage member will provide an in-kind contractual contribution for office space, estimated at $2,400. Sage Library System is providing several cash contributions to the project including $7,000 for a third-party to conduct authorities work, $2,000 to pay for improvements to Evergreen software, and another $2,000 to help pay for additional training substitutes as well as for training for the Cataloging Specialist. This, along with money for hotels, totals $11,700 in cash contributions to the project.

E. Evaluation method

This fall, Sage will be conducting a patron satisfaction survey, with particular attention paid to the catalog and patron's ability to find items they want. This survey will be used as the baseline against which we will measure the effectiveness of this application.

Sage's Cataloging Committee already is developing effective ways to assess what cataloging training has been done by whom. These training records will be archived to ensure that all member institutions have attended at least one in-person training offered by the Cataloging Specialist. We also will create a form to track staff's other training, including the recorded webinars as well as any external cataloging training they may have taken (e.g. sessions at library conferences).

Such training is ineffective unless there is an improvement in cataloging, hence our second objective to reduce time spent fixing errors. Key cataloging staff in the consortium have been noting the time spent correcting cataloging errors. Our Systems Manager and Systems Librarian also log such time in the trouble ticket report system. Using these metrics already gathered, we will assess how much of these key individuals' time is spent correcting other libraries' records within Sage's bibliographic database.

At the end of the grant period, we plan to distribute a survey similar to what we will conduct this fall. The purpose of this survey will be to detect any change to patrons' satisfaction with the cataloging following the work done by the Cataloging Specialist and others.

We plan to publicize this project both internally and externally. Sage primarily communicates through its email listserv, to which all member libraries (and Sage member staff generally) belong. It also uses a wiki (http://sagelibraries.wikispaces.com/) to distribute information. These communication methods will be used to publicize the work of the grant internally. Phone calls will be used when necessary. The Cataloging Specialist will also report regularly to the relevant Sage committees including Cataloging, Circulation, and Development, as well as the User Council.

We want the larger Oregon and Evergreen library communities to benefit from our work. As such, we plan to share the sample policies, procedures, and training webinars we create with the wider community. This will be done via the Oregon Library Association Technical Services Round Table, Libs-or listserv, Northwest Central, and Evergreen listservs.

Part IV: Certification of Application

1. Documentation of project support. Partners listed in Part I, number 12 must sign. The grant applicant signs IV.3.d. If the fiscal agent is different than the applicant, they sign IV.3.e.

I HAVE READ THE PROPOSAL PRESENTED ON THE PRECEDING PAGES. I AM AWARE OF THE OBLIGATIONS THAT PARTNERSHIP IN THE PROPOSED PROJECT WOULD ENTAIL. BY MY SIGNATURE I CERTIFY MY ORGANIZATION'S COMMITMENT TO SUPPORT THE PROPOSED PROJECT AS DESCRIBED IN THE PRECEDING PAGES.

Name *Library/Organization* *Signature* *Date*

2. Certification for Children's Internet Protection Act
   Public and public school library applicants, and consortia with public or school members **must** check one of the options below (a, b, or c).

a.	The applicant public or public school library has complied with the requirements of Section 9134(f)(1) of the Library Services and Technology Act. Every computer connecting to the Internet, public and staff, is filtered. The filter can be disabled upon request of adults.
b.	***(for consortia only)*** Prior to using any LSTA funds to purchase computers used to access the Internet or to pay for direct costs associated with accessing the Internet for a public library or a public school library, the applicant consortium or group will collect and retain a duly completed Internet Safety Certification from every constituent public library or public school library in accordance with requirements of Section 9134(f) of the Library Services and Technology Act. Every computer connecting to the Internet, public and staff, is filtered. The filter can be disabled upon request of adults.
c. **X**	The requirements of Section 9134(f) of the Library Services and Technology Act do not apply to the applicant library because no funds made available under the LSTA program will be used to purchase computers used to access the Internet or to pay for direct costs associated with accessing the Internet for a public library or public school library that does not receive discounted E-Rate services under the Communications Act of 1934, as amended.

3. Certification of the grant applicant and/or fiscal agent (if different than applicant)

a. I affirm that the jurisdiction or organization (henceforth, ORGANIZATION) is the designated fiscal agent for the project described in this application and is empowered to receive and expend funds for the conduct of the proposed grant project.

b. I affirm that the information contained in this application is true and correct and that the ORGANIZATION for which I am an official has authorized me to submit this application for LSTA grant funds.

c. I affirm that if this application were to result in the ORGANIZATION being awarded grant funds to carry out the project described in this application, that the ORGANIZATION would comply with all of the federal and state requirements for the administration of LSTA grants, including part IV.2 above and allowable costs described in Appendix B of the General Information and Grant Application Guidelines, Library Services and Technology Act.

d. Signature of grant applicant

Perry Stokes
Name of official authorized to enter into contractual agreements for the ORGANIZATION

Sage User Council Chair
Title

Signature 8/11/2014
Date

director@bakerlib.org
Email

541-523-6419
Phone number

e. Signature of fiscal agent (if different than applicant or if applicant is not a 501(c)3 or legally established entity or if applicant does not have contract authority for the ORGANIZATION)

Perry Stokes
Name of official authorized to enter into contractual agreements for the ORGANIZATION

Library Director
Title

Signature 8/11/2014
Date

director@bakerlib.org
Email

541-523-6419
Phone number

This form must be received at the State Library no later than 5:00 p.m. on Friday, August 15, 2014.

Email a Word or PDF of your proposal to *ann.reed@state.or.us*. It is fine if you are not able to include letters of recommendation or appendices in the electronic copy. The electronic copy does not substitute for the hard copy original. Hard copy must be **single-sided**. The hard copy original of this form with signature must be received at the State Library no later than **5:00 pm on Friday, August 15, 2014. Faxed copies will not be accepted**. There are no exceptions. If requesting indirect costs, attach appropriate sections of a federally- approved indirect cost plan.

Mail or deliver **one copy** of your application to:

Library Development Services
Oregon State Library
250 Winter St., NE
Salem, OR 97301-3950

Job Description
Sage Library System Cataloging Specialist

Summary
Trains Sage member institutions in cataloging principles and practices. Investigates and fixes problems in Sage bibliographic records. Creates training documents and recordings for Sage member institutions.

Essential duties and responsibilities
1. Trains Sage member institutions to use the Integrated Library System (ILS) to catalog materials.
2. Writes, organizes, and disseminates technical information to Sage member institutions.
3. Prepares training documents, recordings, and trainings on cataloging principles and procedures.
4. Works with the Sage Cataloging Committee and User Council to standardize and update cataloging policies and procedures.
5. Creates and runs reports.
6. Analyzes reports to find improvements in the system.
7. Assists in cleanup, standardization, and cataloging of bibliographic records within the ILS.
8. Works with Sage technology systems and services to implement improvements to the OPAC.
9. Enters, updates, and removes catalog records in the ILS and public catalog using MARC, AACR2, and RDA metadata standards.
10. Answers cataloging-related questions from Sage member institutions.

Peripheral duties
1. Attends meetings and training seminars as required.
2. Performs other job-related duties as assigned.

Supervision received
Works under the general supervision of the Library Director, who assigns and reviews work to serve all Sage Library System member institutions. Works closely with the Sage Library Systems Manager, who may assign projects with input from the Library Director and Sage Library System User Council, prioritized by overall impact to the Sage consortia.

Supervision exercised
Supervision of other employees is not a normal function of this position.

Desired minimum qualifications
Education and experience:
1. Bachelor's degree from an accredited institution, or equivalent.
2. Two years experience working in customer service, preferably in a library.
3. Two years experience performing copy and original cataloging in a library environment.
4. Any equivalent combination of education and experience satisfying the above.

Necessary knowledge, skills, and abilities:
1. Knowledge of library organization systems, including Dewey Decimal Classification and Library of Congress Classification.
2. Knowledge of MARC, AACR2, and RDA metadata standards. Familiarity with Dublin Core standards desirable.
3. Experience using integrated library system software, public library catalogs, and bibliographic utilities.
4. Familiarity with contemporary and classical literature and audiovisual materials.

5. Ability to type 50 words per minute.
6. Familiarity with the Internet and basic office applications, especially word processors.
7. Ability to effectively communicate verbally and in writing.
8. Ability to read, write, and interpret routine documents such as reports, correspondence, policies,
9. and procedures.
10. Close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to
11. adjust focus.
12. Ability to perform essential job functions with or without accommodation.

Tools and equipment used

Personal computer, including the Internet, general office applications, and integrated library system software; book carts; copy machines; telephones; typewriters; fax machines; general office tools; calculators; media players; televisions; other tools and equipment necessary to perform the essential and peripheral duties of the position.

Working conditions

1. Stares at computers screens and monitors regularly while carrying out essential job functions.
2. Normal office exposure to noise, stress, and disruptions.
3. Frequently required to walk, sit, talk, or hear. Occasionally required to climb, balance, stoop, kneel, crouch, or crawl.
4. Full-time position, 40 hours per week. Some weekend and evening hours may be required.

Hermiston Public Library
235 E. Gladys Avenue
Hermiston, OR 97838
Phone (541) 567-2882 • Fax (541) 667-5055
library@hermiston.or.us
www.hermistonlibrary.us

My name is Heidi Florenzen. I am a reference and technology librarian at Hermiston Public Library, a member of the Sage Library System (Sage). I am also the point person for circulation services and staff training at my library. I fully support the Sage Library System's LSTA Grant Proposal "A Clean Slate."

Duplicate records and poor quality records in our system have led to difficulties in searching, locating, and requesting a needed or wanted item. This directly affects both staff and patrons. I often have to search multiple times and differing fields to determine if the needed item is owned by any Sage member. And I spend more time training staff to search more effectively to better serve our patrons.

Duplicate records are the most evident problem I have to work around in the system. It can often be difficult for staff, let alone patrons, to decide the best title record to choose when placing a hold, especially when there are time constraints for receipt of materials. With Sage's geographically vast system and multitude of courier vendors, choosing the wrong title record can extend receipt of an item from a few days to a week or more. And if the title record has only one item available that turns out to be missing, or is never returned, a patron's hold may never get filled even if a duplicate title record has readily available items. This can cause an inconvenience for casual or recreational library users. For those doing homework or research crucial deadlines can be missed. I merge records as I find them, but it is a serendipitous and inefficient process.

Determining the format of an item is another problem I encounter often. Poor title records or lack of staff training has led to items being attached to the wrong records. I have many times seen item records of varying formats attached to the same title record. Patrons that need a large print edition may end up with standard print. Teachers that need a DVD for a class may end up with a Blu-ray disc or a VHS tape. And relying on an item's call number or location is not always clear. Some libraries list all of their film collection under "Videos" or "Movies."

User interface problems arise in the OPAC with poorly formatted or incomplete title records. Last year records from a small county system were uploaded into Sage. They had a failing server and were unable to clean up records before they were uploaded. To compound the problem, the software they were using did not export MARC records correctly. Many MARC tags were duplicated. I find records from this merge that do not display titles or authors in the OPAC. Patrons and staff often come to me with questions when confronted with one of these records.

Our OPAC also includes format images for patrons to quickly identify what they need. Patrons and staff often overlook search matches because they skim over results using that image as a quick way

to filter results. Sometimes patrons are erroneously told by staff that the format they seek is not available. Or they may give up searching without asking for assistance. Again, I find myself "spot cleaning" both types of these problem records when they are brought to my attention.

The most difficult problem in Sage, from my perspective as a reference librarian, is substandard title and serial records. There are many records that do not include any descriptions. Worse is the lack of subject headings in records. This makes it next to impossible to find items in the OPAC if a critical keyword is not included in the title. And if they are found, it is difficult to determine if they may include needed information. There are other records that are missing subtitles. These subtitles can sometimes be the only way to differentiate between books in a series. With patrons that need specific editions or years of a publication finding the needed item can sometimes be impossible. We have, at times, received the wrong item. Other times we have had to tell the patron, without certainty, that we can not get the item locally.

Reducing duplicates in our system, cleaning up poor quality records, and increasing training of catalogers will have a significant benefit for myself, my staff, my library's patrons and all Sage member libraries. I feel we will be able to reduce money spent on lost staff time and courier costs. And, overall, our patrons will be better served. That's what we all strive to achieve.

Heidi Florenzen
Hermiston Public Library
hflorenzen@hermiston.or.us

Heather Staten
2931 Reed Road
Hood River, OR 97031

August 12, 2013

Ann Reed
Library Development Services
Oregon State Library
250 Winter St. NE
Salem, OR 97301-3950

Dear Ms. Reed,

I am writing to express my strong support for Sage Library System's proposal for a grant to expand cataloging capacity under the Library Services and Technology Act FFY2014.

My family frequently uses the Hood River County Library for pleasure and for research. Because we are such heavy users of the library, we interact regularly with the Sage catalog. We've learned to cope with some of the idiosyncrasies of the current catalog. Sometimes, the system doesn't correctly prioritize fulfilling a request. The first item shown on the catalog might be from another library. We would then place a hold, only to find out that the book is actually on the shelf at our own library. Sometimes it is unclear what format the material is in—we have ordered items thinking they were books only to have an audio-book delivered.

These occurrences are frustrating even for tech savvy patrons like us. They must be doubly frustrating for the many—especially older—patrons who are not comfortable with computers or patient with searches.

A clean, accurate catalog is a basic requirement to providing good library service. A patron needs to be able to trust that the item listed is what it says it is, is available from the most convenient location and in the expected format.

We love Sage! We order books from partner libraries in the Sage system nearly every week. It is a great service that will be made even better with an up-to-date catalog. We encourage you to approve this grant.

Best regards,

Heather Staten