Leaping from the Middle
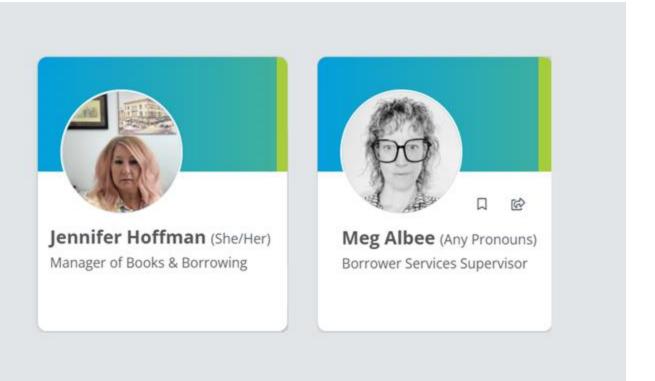
While your organization is busy with other things

Meg Albee and Jennifer Hoffman

Who we are

Jennifer Hoffman (She/Her)
Manager of Books & Borrowing

Meg Albee (Any Pronouns)
Borrower Services Supervisor

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A bit about . . .

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27 locations

3 bookmobiles

Central Library

Internal and Statewide Delivery

Circulation Policy and Procedure

Circulation Training

Show of Hands

Already using Leap?

Polaris site, considering Leap?

Other?

Innovation vs Change

2011
Polaris Migration
Major organizational shift

2020-2022
COVID-19 forces
the issue

2024
All front line
service points on
Leap!

Pre 2011

On CARL since the
stone age

Last big adoption =
CARL.Solution

Burning platform

2014
- III buys Polaris
- We hear about Leap &
  make some small hops

2023
Leap Go Live
Begins

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(2015-2019) Watching in the wings

Began experimenting early:
          Check Out
          Check In
          Patron Registration

Waiting for critical functions to be added

2020 Silver lining?

COVID-19 Lockdown
        Leap only
    Exploring more features
            Reading documentation

New Circ Manual
        Screenshot challenges

2022 Creating Change Tools

Leap Practice document

       Practical exercises in new interface

Test database lessons

Experiments with workflow (i.e. printing)

Early Adopters

       Central teams

Fresh Leadership
     = partner in persuasion

7.4 - Getting Closer!

With Polaris 7.4, Leap had *almost* everything we needed, except serials check in.

Key Requirements that were met:

Basic Transacting

Record Sets

Linking between records

INNReach functionality

2022-2023 CEN reno & other priorities

…If not now, when?

Partial re-opening shift to "parkview" space

all Leap all the time!

Encouraged adoption by:

Regular trainings/meetings

Suppression of Staff Client ico

Eventually removal of staff client :)

Early 2023 - Going for it!

Go time.   Well, maybe . . .

Strategy:

- Engage branch leads
- Start all new staff on Leap
- Share the practice document
- Provide question template
- Roll Out Process
  - Schedule all locations for a "go live"
- On-site training
- Desktop Icon roll out

Late 2023 -2024 Active Rollout!

Barriers - Awkward dual system time :)

- Departmental and location buy-in
  - Leadership and non-frontline staff
- No hard transfer date
- Resistance to change

2024 Building the (systemwide) Team

Reorganization and Growth!

- Train the Trainer (Circ Supervisors)
- Sharing Circ Training system-wide
- Updating e-Curriculum for Leap

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Motivational Strategy

Carrot/Stick Motivation

- programming scanners only for Leap
- suppressing Polaris staff client icons
- threats! (jk)

On-Site Training Approach:

- Group overview
- Position-based individual training
- Demonstrate with live customers

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2025 Ongoing Challenges

Competing Priorities

Non-frontline buy-in

Software Limitations

Wins (what we love)

➜ Great search features
➜ Hyperlinks
➜ Similar interface to Sierra

The best parts of Leap have been receiving Prospectors, printing different lists of items on someone's account (i.e. overdue items, checked out items, Lost items, etc.), being able to batch change things on customer accounts more easily (such as suspending someone's holds all at once), and the general search finding most customers quickly. Folks also like the little information bubble where we can see customer ages, notification option, etc. quickly and easily.

"There's a lot I like about it. My fav part though is still having an updated and streamlined UI. Some folks liked the marbles, but personally the old client felt cluttered and most the icons made zero sense - it was a visual mess, and Leap is much easier to navigate."

"Creating record sets is much easier and the initial search bar is similar to web browser searching which helps new people when they are learning."

"For the most part, leap can do everything polaris can do and more. We love receiving prospectors through leap, it's much easier being able to search."

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Biggest (remaining) issues

➔ Printing
➔ Large record sets
➔ People hate to feel dumb or clunky

I miss all the COLOR, and icons and balls from Polaris. I appreciate the updates of Leap that add more and more of the Staff Client functionality."

The hardest parts of the transition for most of my team were switching from using the keyboard shortcuts to using the mouse, the extra clicks to get to things (such as holds slips, and in depth title searches), and buttons being in similar but not quite the same locations.

"I think staff who are very proficient in polaris found the transition really frustrating because they're used to being faster, and leap has different keyboard shortcuts and is a lot more mouse-based."

"The need to press enter twice for every slip that prints continues to be aggravating especially for those with repetitive stress injuries. But overall, I think getting over the initial shock of learning something new, leap has been really great to use. The auto searching for patron info while typing is very helpful."

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Learning a new flow

Some stats:

Number of trainings

       10 train the trainer sessions

       27(ish) Branch Go Lives (plus return visits)

       44 individual sessions (for existing staff)

Individual Trainees

       Branch Staff: 108

       New Hires: 30+ (and ongoing)

11 e-Modules Created (with more to come)

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2025 - Moment at hand 7.7

All frontline staff on Leap!

Things we are most excited about:

- Load More
- Search History
- Search Filters
- Multiple Select in Lists
- INNReach Check in

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Key Takeaways

1) Change is Hard

1) Change is Good

3)   In Leap (as in sports), practice practice practice!

THANK YOU

Questions?