

## Tackling the Big Projects

### Do it Yourself or Contract with a Vendor?

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Everyone who works with library technology sooner or later finds they are faced with a major project to tackle. Sometimes we contract with a vendor to do the bulk of the work, sometimes we do the project ourselves. There are advantages and disadvantages to both methods.

Here at San Jose Public Library we were faced with two large projects at once—a website migration/redesign, and a new catalog discovery layer. We considered BiblioCommons as the vendor for both projects. They offer both a website product (BiblioWeb) and a discovery layer (BiblioCore). We opted to complete the website migration/redesign ourselves using open source software, migrating from our previous Drupal 7 platform to Drupal 8, and to contract with BiblioCommons to provide our new discovery layer.

This put us in an unusual position. We were implementing a website migration/redesign ourselves while simultaneously working with the vendor we would likely have chosen for the website project on the catalog discovery layer. This gave us the opportunity to compare the experience of implementing the website project ourselves with what the same project might have been like if we had been working with a vendor.

#### WHAT WE LEARNED

##### *Timing*

Not surprisingly, completing the website project on our own took longer than expected.

- Learning curve—We expected there to be a learning curve but it turned out to be significantly steeper than anticipated.
- Unknowns—In addition to basic learning, we also came across functionality that didn't work as expected.
- Failures—There were times when what we tried to do didn't work at all and we had to backtrack.

Timing for the vendor-led project, on the other hand, kept to the planned timeline.

- Prescribed timeline—As part of their contract, the vendor provided a timeline at the outset. We made small adjustments but for the most part the project stayed on time.
- Predictability—The vendor has completed many similar projects so they had a solid idea what to expect and how long it would take.
- Problem solving—Some challenges unique to our situation did arise and caused some delays.

##### *Control*

The ability to have more control over the project results was a significant factor in our decision to complete the website project ourselves. We had the opportunity to make choices and also faced the challenge of a sometimes-overwhelming number of options.

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- Options—Many options were available to us. We had choices regarding structure (website platform and theme), design and content.
- Overwhelm - The plethora of options encouraged a tendency to spend a lot of time (too much?) “shopping”—researching and evaluating options.
- We completed a thorough audit of our content and created a new site based on our needs.
- User experience (UX) testing—We were able to perform testing with our users and adapt our website to better fit their needs.

Working with a vendor, on the other hand, limited what we were able to do but the decision-making process was easier and faster.

- We had the option to select colors but otherwise the structure and design were fixed.
- We had some control over textual content within the parameters given. E.g. we could add links to the footer but the number of links allowed was limited.
- Little time was spend making these decisions.
- It’s a challenge fitting unique content into a pre-determined format.
- User experience (UX) testing—The vendor is able to include a wider sampling of people while testing, but they’re not able to specifically consider our local users.

### ***Implementation***

For the website project, implementation turned out to be more complex than expected.

- Learning—as mentioned above, there were many new things to learn that came up as the project progressed.
- Consultant—We came up with technical questions that were beyond the scope of our knowledge. We found it extremely helpful to contract with a consultant for guidance.
- Conflicting responsibilities—We worked on this project while continuing with our normal workload and maintaining the current website. We were also simultaneously working on the discovery layer implementation.

The vendor-led implementation went more smoothly.

- Learning—the vendor assigned a project manager, who was available to guide us through the process. The vendor also provided documentation that walked us through the process.
- Expertise—When challenges did arise, the vendor had an experienced staff to help us work through them.
- Staff time—Although the vendor did most of the work, the project did consume significantly more staff time than expected as we worked through every detail.

### ***Training and Marketing***

- Staff - For the website, we had to create our own training for staff. For the catalog, the vendor offered webinars for staff and sent a trainer to do in-person training.
- Public - The vendor offered samples of materials from other libraries to both inform and educated the public. Since both projects were launching at the same time, we were able to adapt some of these materials to include both.

### ***Cost***

The cost of hiring a vendor initially seems steep, but staff time is also expensive. Considering the unexpected additional staff time spent, it likely would have been less expensive to choose the vendor option.

**Conclusion**

There are pros and cons to both methods—completing a project on your own or working with a vendor. Whether your project is a new website or catalog or something else entirely, learn as much as you can about what will be involved before you decide on an approach. Weigh your options by looking at your needs and the resources and time available to you. The primary aspects to consider are:

- Do staff have the necessary expertise to complete the project? Will there be a learning curve? Are staff prepared and willing to learn new things and figure things out? If you are considering a vendor, do they have a training plan for
- How much time is available? Is there a deadline? If there is a deadline, what will be the costs if it needs to be extended? If you are considering a vendor, how committed are they to achieving the prescribed deadline?
- Which is more important to you—control and flexibility or ease of implementation?
- What resources are available if you have questions? If you work on your own, are there people and online resources you will be able to turn to? If you are considering a vendor, will you be assigned a representative to walk you through the process?

For our particular situation, I believe we made the right choice to complete the website project on our own. Staff had enough expertise that they were willing and able to learn the necessary skills, calling upon a consultant when needed without outsourcing the entire project. While we had an expected timeline, we were able to extend it with only minor consequences (paying for additional web hosting while the project was under construction.) We maintained the control and flexibility we needed in order to present some of the unique services and spaces that our library offers, which might have been lost using a vendor package. We had some knowledge of consultants working in the field and were able to hire one to show us how to proceed when we were over our heads. We also relied heavily on tutorials and other training resources posted online.

Whatever you decide, taking time to think things through before beginning will help make your project a success.