

## **DRAFT – August 26, 2010 Meeting**

The Southern System Automation Managers seek to develop an LLSAP proposal for consideration by the Southern System Planning Panel Resource Sharing committee. This plan includes basic philosophy as well as options for the future.

### **Basic philosophy**

- We support resource sharing.
- We believe in cooperation and continuing efforts to bring more libraries into the automation program(s)
- We have a responsibility to not betray the trust of our current and future members.
- We support automation of library workflows and operations and continuation of local policies, within the constraints of any chosen software product.
- We are committed to providing an affordable, functional product.
- We will continue to build relationships with members, not just provide vendor service.
- We want to have enough resources to be able to optimize and expand services and products available to members in the future.
- We believe that the system automation program should cooperate to the fullest extent possible with a system organization unless there ceases to be a system organization. In the best-case scenario, with a restructured system organization, the four automation programs would remain under the restructured system administration. In a worst-case scenario, with no system organization, the four automation programs would establish a separate nonprofit administrative entity.
- Any proposal made by this group is incumbent on the regional system, in whatever form that may evolve, being able to provide delivery. The database should be structured in such a way that requests will be filled taking geographic proximity into account (so patron requests would be filled from nearby libraries if the item is available nearby), in order to maximize efficiency of the delivery system and provide prompt service to patrons.

### **A. Automation Program Scenario**

#### **Operational - July 1, 2011**

#### **Initially maintain 4 separate automation programs, under one regional system administration**

With this option, the four southern system automation program members would choose or retain different vendors with separate

bibliographic catalogs, maintaining their own existing program. The hardware would be co-located in a separate, secure location.

- We would be able to offer a fully-featured ILS to our members
- We would reduce infrastructure costs substantially by co-locating and reducing the overhead
- We would share expertise with system automation staff as possible
- We would each continue with group-determined options for cataloging and would explore options for cooperative cataloging
- We would be able to maintain local policies but would work toward shared resource-sharing policies
- We would continue to have separate automation governance structures
- We would continue to 'grow' our own system membership
- We would not share a common cost formula but would work toward complete support of the automation program through member fees
- We would begin to include a four-system resource-sharing solution or component that would allow libraries in the four southern systems to easily request materials from each other. This will be more difficult with separate automation vendors.

### **Operational beginning after July 1, 2011**

As soon as existing contracts, finances, and member input allow, the four southern system automation program members would choose the same automation vendor and migrate when possible to this system. We would initially have separate bibliographic catalogs with the end-goal of merging those catalogs if possible. The hardware would be co-located in a separate, secure location.

- We would be able to offer a fully-featured ILS to all of our members
- We would reduce infrastructure costs substantially by co-locating and reducing the overhead
- We would share expertise with system and library staff using the same ILS and could collaboratively staff a virtual help desk
- We would work together to enhance functionality and implement new services
- We would offer options for cataloging – centralized cataloging for a fee, cataloging training/certification for those libraries doing their own cataloging, and/or a CMC-like organization who would do original cataloging only for a fee
- We would be able to maintain local policies but would work toward common resource-sharing policies as much as possible
- We would work toward one automation governance

- We would continue to 'grow' the membership
- We would include an add-on resource-sharing software component that would allow libraries in the four southern systems to easily request materials from each other.
- We would work toward a common cost formula and would work toward complete support of the automation program through member fees

**B. The following scenario is presented only if the restructured regional library system cannot feasibly support the automation programs (because of depletion of assets and no forthcoming state funding for management and administration of the regional library system)**

With this option, the automation program(s) would create a separate nonprofit entity with one management structure (overhead) for the four separate automation programs. In this scenario, the four southern system automation program members would choose or retain different vendors with separate bibliographic catalogs. The hardware would be co-located in a separate, secure location. We would be able to continue to offer a fully-featured ILS to our members

- We would reduce infrastructure costs substantially by co-locating and reducing the overhead
- We would likely not be able to share expertise with system automation staff
- We would each continue with group-determined options for cataloging
- We would be able to maintain local policies
- We would continue to have separate automation governance structures
- We would continue to 'grow' our own automation membership
- We may or may not share a common cost formula
- If costs allow, we would investigate a resource-sharing software component that would allow libraries in the four southern systems to easily request materials from each other.
- The automation programs would separate as one independent entity from the restructured system administration. This would mean four separate automation programs would have one management (bookkeeping, billing, contractual, administrative) system.
- Payment or intergovernmental agreement for delivery is unknown at this time.

**UNDECIDED OPTIONS (carried over from previous meetings)**

- Whether to offer multiple automation products (open source, proprietary ILS, and web scale), with the end goal that we might be able to continue to develop and automate additional libraries while continuing to support our current groups;
- Whether to offer two tiers of functionality – a full-fledged level and a minimal level at different pricing structures with the goal of further expanding resource-sharing across the state.
- How to design a membership selection process in the event we decide to choose a product
- How to determine viability or scalability of a vendor product to handle a situation such as ours
- Whether to build the vision of the future or build the framework for what we have now, with an eye to expansion in the future
- Will there be centralized cataloging? If not, could there be a CMC-like service to provide backup cataloging for the group?
- Will there be ancillary services (like My Media Mall), and if so, will participation in those services be automatic (LTLS model) or optional?
- What options will we use for servers? There is agreement on co-location at an ICN POP, most likely Champaign. However, would servers located at other POPs be redundant or would each server carry a portion of the database, for load balancing?
- Is there a desire on the part of the State Library to see LLSAPs on an open-source product? In a statewide database?
- Where does OCLC's Web Scale Management product fit into this equation?
- How do we address the needs of the smaller, less affluent libraries, who may be either (a) in danger of having to terminate LLSAP membership or (b) not automated at this point, and needing encouragement to join an LLSAP for automating their circulation and gaining access to resource sharing? Two options were presented: (a) two platforms, one open-source (for those with simpler needs or less money), one ILS (for those with more money or a desire for a more robust product); (b) a two-tier pricing structure for a single platform -- the lower tier would provide only circ, the catalog, and resource sharing, with possibly minimal canned reports; the higher tier would provide all services, acquisitions, serials, full reporting, any add-ons.