

Commonwealth Libraries
State-wide Integrated Library System (ILS) Task Force
Administrative Working Group &
Technology Working Group
Recommendation Documents: In Progress

Governance Recommendation: The Office of Commonwealth Libraries would like a recommendation from the Administrative Working Group on the organizational structure required to manage a state-wide ILS.

Task Force Status: The Administrative Working Group surveyed and evaluated the governance setup for existing state-wide ILS projects and other consortia. A sub-group of the Administrative Working Group has developed a draft governance recommendation based upon creating a governance structure for a State-wide ILS that addresses the following needs:

- Independent
- Set the pace for everything including: policy development, training, marketing
- Represent libraries of all sizes
- Nimble: agile in movement or action; deft

The governance draft recommendation developed by the sub-group is currently being evaluated by the full Administrative Working Group.

What You Can Do to Help: Please share your questions and concerns regarding the governance of a state-wide ILS. Information can be sent to John Brice at jbrice@meadvillelibrary.org.

Circulation Policies Recommendation: A state-wide ILS will require some agreement among participating libraries on circulation policies for the shared system. In order to speed the process of policy adoption, Commonwealth Libraries would like a recommendation from the Working Group that it can offer as a proposal to whatever governing and advisory bodies are eventually created for the system.

Task Force Status: A sub-group of the Administrative Working Group is creating a matrix of circulation policies for libraries of varying sizes. In addition, libraries of various sizes participated in a needs assessment survey to provide background information to help with the formulation of circulation recommendations. Information collected includes material types, loan periods, fines/grace periods and customer types/privilege information.

What You Can Do to Help: Please share your circulation parameters! Information can be sent to lcollens@schlowlibrary.org or can be faxed to the attention of Lisa Rives Collens at 814-238-8508.

Cataloging Policies Recommendation: Cataloging standards, policies, and practices are another area where agreement among the participating libraries is required. Modern, faceted, search interfaces generate their facets directly from data contained in bibliographic and item records. Consistent cataloging practices and a clean database are required for such an interface to be effective. Clear, standards-based policies will help to produce a clean database.

Task Force Status: A sub-group of the Administrative Working Group is creating a matrix of cataloging policies for libraries of varying sizes. In addition, libraries of various sizes participated in a needs assessment survey to provide background information to help with the formulation of cataloging recommendations. Information collected includes record formats and standards, required data elements for each material type, classification schemes, copy and original cataloging sources, and authority use.

What You Can Do to Help: Please share your cataloging parameters! Information can be sent to library@adamslib.org or can be faxed to the attention of Tracy Trotter at 724-537-0338.

Marketing Recommendation: The Office of Commonwealth Libraries would like a recommendation from the Working Group defining the key components of a marketing plan for a state-wide ILS. The marketing plan should focus on garnering full participation among Pennsylvania public libraries.

Task Force Status: A sub-group of the Administrative Working Group has assessed the marketing strategy used by other state-wide ILS. Libraries of various sizes participated in a needs assessment survey delivered by the marketing sub-group to provide background information to help with the formulation of recommendations. Together, both the Administrative and Technology Working Groups are working to develop a list of Frequently Asked Questions.

What You Can Do to Help: Please share your answers to the following questions:

1. What is the best way to communicate with your board, staff and community the benefits of a new statewide ILS?
2. What marketing tools would you like to see developed to support a new statewide ILS?

Please send your thoughts to Barbara McGary at bmcgary@jvbrown.edu.

Architectural Parameters Recommendation:

In order to determine what hosting architecture would best support a state-wide system, the Office of Commonwealth Libraries needs to develop a clear picture of service level expectations of potential participants. The Technology Working Group is asked to recommend a set of service level parameters related to the system architecture.

Task Force Status: The Technology Working Group has developed a draft recommendation for uptime and response time requirements, system monitoring and back-up, server, power, and network redundancy requirements. These were based on a review of existing ISP, ILS and web-hosting contracts, as well as discussions about accommodating libraries of all sizes and functional levels.

What You Can Do to Help: Please share information (especially if you believe it may be fairly unique) about what your library needs in terms of uptime, system monitoring and the like. You can send your input to Nathaniel Rasmussen at nrasmus@schlowlibrary.org

Functional Recommendation:

Proper evaluation of software for a state-wide system must take into account the needs of disparate libraries and library users. The Working Group is asked to develop a set of functional goals (consistent with those already articulated in the Task Force Charge), and then to use those goals to create a prioritized list of broad functional requirements for a state-wide system. The Working Group is specifically asked not to describe specific workflows or a user interface, but rather to concentrate on broad functionality.

Task Force Status: The Technology Working Group has begun an extensive (if broad) module-by-module review of key ILS functionality--much of the review was based on the functional documents developed by the Galecia group, found here: <http://oss4pl.org/resources/other-resources/> The Group is beginning the process of prioritizing these components, and will be drafting a more cohesive list of weighted recommendations during a meeting in April.

What You Can Do to Help: While it is not the charge of the Work Group to evaluate specific workflows within an ILS, it is important to identify "show-stopping" functional components that would prevent your library from considering involvement. Please share any functionality your library uses that you could not operate without--especially if you believe the functionality may not be used by all libraries (such as "acquisitions: selection & approval"). Your input may be sent to Scott Thomas at scott@albright.org.

Services Recommendation:

The Office of Commonwealth Libraries would like the Working Group to recommend what support services should be part of a state-wide ILS program. Please consider the technical expertise of, current services available to, and service goals of public libraries in the Commonwealth of Pennsylvania. What services should be provided centrally in order for a state-wide ILS project to be successful? What level of services is needed?

Task Force Status: The Technology Working Group is in-the process of evaluating data migration, project management, workstation management, network management/security design, hardware support, software support and training needs. The Technology Working Group will be meeting in April to work on a draft services recommendation.

What You Can Do to Help: Consider how your library receives these services today. If your library were to switch to a statewide ILS, which of these services would need to be accommodated/provided for you to maintain and/or improve your level of service? Send your thoughts to Scott Thomas at scott@albright.org.