

Directors' discussion of the Next ILS

These minutes reflect comments gathered at the following three meetings:

CARLI Board, December 5, 2008, Abraham Lincoln Presidential Library, Springfield
Governing Directors, December 8, 2008 CARLI Office, Champaign
Governing Directors, December 12, Illini Center, Chicago

CARI and Open Source Background:

CARLI currently uses 4 commercial proprietary systems and another 20 or so that are open source. In order to encourage new systems to develop with the consortial environment in mind, the CARLI staff is involved in early stages of development with the 3 new open source ILS projects:

- VuFind is currently in use by some I-Share libraries as an alternate discovery tool for I-Share.
- CARLI is a partner in the eXtensible Catalog project at the University of Rochester. XC focuses on the public access search and discovery for a variety of formats other than MARC. Development and testing is currently by invitation but will eventually be open source.
- Open Library Environment (OLE) is the Mellon-funded project at Duke working on development of staff module functionality. CARLI staff recently attended a meeting at the University of Chicago to provide input on the critical functionality for the staff/office modules of a new ILS. CARLI staff will serve on two OLE working groups.

1. What are the essential and organizing principles of I-Share (regardless of the software)?

- Resource sharing is the heart of our ILS and our greatest strength.
- Maximum access, minimum barriers.
- Resource sharing should be enhanced in the next ILS to allow journal borrowing, direct patron borrowing across disparate ILS's and non-I-Share governing members
- Federated search/faceted searching that works across different types of materials. Must search more than MARC.
- Allows discovery and linking to digital collections and other resources that are already in collections but not discoverable in the current system. Enables access to all the content we own, and the ability to share it.
- Ease of access combined with ability to get to very deep levels of resources. Users able to decide what they want.
- Smooth, reasonable functionality for the user. Easy to use and learn.
- Allows for maximum personalization of the patron experience.
- Available from a variety of public search and discovery tools. Google Books, Facebook, online course platforms etc. Patron chooses how they want to see it.
- Social networking capabilities.
- Local control of user tagging to maintain the high standard of the catalog.
- CARLI-hosted for most or all libraries.
- System should be flexible and expandable.
- System is flexible enough to support different types of users

- Retain some commonality so that users have a familiar experience in catalogs outside of their home institution.
- From the patron's perspective, one way to do ILL.
- Flexible, customizable at the local level, can be integrated with other products.
- Single search is balanced by performance. Trying to put too much behind a single public interface may overwhelm the system.
- Accommodates the consortial environment.
- Possible to extract data out of the current system or an understanding of what we would potentially lose in the transition.
- Accommodates multiple levels of users.
- Accommodates the leaders as much as the smaller, non-technical institutions.
- Improved access to reporting functions.
- Small and large organizations must be able to fully exploit capabilities. Not dependent upon in-house IT expertise.
- Modularity to enable institutions to participate in parts of the system—not an all or nothing solution.
- Institutions able to set local borrowing privileges and borrowing periods.
- Robust performance, improved speed.
- Ability to mine search information, borrower data to return results that are 'intelligent' rather than just 'relevant'.
- Compatible with mobile devices.
- Supports emerging technologies in resource sharing (e-books, print on demand, electronic document delivery.)
- Money is an issue. In the current economic climate, resources are extremely limited for CARLI and for public and private institutions. Commercial systems are very expensive and would likely be an investment by libraries in both initial purchase and for annual maintenance fees.

2. **Assuming a timeline is NOT forced by outside circumstances, how will we know when it is time to move to a new system?**

- Vendor ceases to support the system, goes out of business or is acquired by another.
- Performance degradation. Users waiting longer for results.
- The current system can't fulfill the basic list of critical functions.
- The number of widgets we're developing to maintain critical functionality becomes overwhelming.
- Obsolescence from the user perspective or the technical support perspective.
- Peer institutions are offering tools that are significantly better than what we can offer. Patrons can't do what they could do at other institutions.
- Something better becomes available.
- Inability to grow the current system. New libraries shut out of consortial borrowing.
- Timing—mass rush in the marketplace to a particular system.
- Compelling cost-savings. Introduction of a new product that's a good solution, is inexpensive, and has a robust development community supporting it.
- In a disintegrated system the timing of decisions would be influenced by the availability of new modules.

- Students want to go to one place. The current focus on traditional print library materials and the inability to put other resources behind our current system is intolerable.
- CARLI and library staff have the time and the resources to make a change.
 - Question: If there is disintegration of system components, would a certain number of institutions need to commit to various components to make it possible?
 - Workload of integrating various components and systems would probably shift to CARLI. (Cost of stitching vs. cost of switching.)

3. Should the implementation of a new ILS serve a defined community, as I-Share has for over 25 years, or should the introduction of a new ILS create the opportunity for disparate systems (CARLI managed systems, remotely hosted commercial systems, other consortial systems, stand alone systems) to function in coordination to support comprehensive resource sharing for CARLI, as a whole? If the former, how large a community must the new ILS be able to serve?

- The next generation ILS enables resource-sharing across disparate systems much as is possible without sacrificing the performance of the system and the level of service to existing I-Share libraries.
- Allow disparate systems to encourage broader participation in resource sharing.
- Flexibility to create resource-sharing subsets—i.e. all ARL libraries in the state.
- Supports resource sharing among academic institutions and public libraries alike.

4. What is the member libraries' tolerance for risk (open source, mixed modules) in selecting/developing the next ILS?

- Tolerance for risk and ambiguity is greater for a CARLI-hosted ILS.
- Tolerance for risk will be higher if production-critical modules are maintained when experimental modules are introduced (the VuFind model.) Public access can be implemented independently of staff functions. Staged implementation of staff functions depends on system architecture, practical adherence to standards, etc.
- People are more knowledgeable about open source now than 5 years ago.
- We want CARLI to be a leader, a developer, an innovator.
- CARLI should be engaged with the current development environment to ensure new systems to grow with the consortial environment in mind.
- Open source may be more predictable and allow for more control of our own fate than if we're relying on commercial vendors or a product that may not be around in 5 years. It may be better to invest in a CARLI solution that is closer to what we need rather than buying an external system and making it fit our needs.
- Open source development leverages the strength of the consortium.
- All open source products are not alike. Different products have varying levels of support in the development community. Responsiveness and timeliness of development in response to functionality varies from product to product.
 - How many libraries should be on an Open Source product before we'd be comfortable with putting it in production?

- Universal borrowing is unlikely to come as a part of any commercial system. If we're adding this 'on top' of any existing system, we may as well add it on top of something else that isn't exclusive.
- Tolerance may depend upon how much data libraries would lose in a conversion to a new system.
- Support for a larger community and disparate systems changes the role for CARLI from running the system for a select clientele to running a bigger variety of systems. Staff time for support increases. Time commitment moves from switching to stitching. It's not necessarily riskier, cheaper, or more flexible; it's just a different business model.
- We might be developers or we might work with a support firm.
- Open source may allow better linkages with local accounting systems.
- Open source development allows for a model of "Crowd-sourcing" solutions for ILS.

5. Will the transition to the next ILS be generational, as in the past (LCS/FBR □DRA □Endeavor/ExLibris), or evolutionary, through the acquisition/development of a series of components that perform the functions of a traditional ILS, and potentially more?

The groups expected the transition to be evolutionary, to various modules that are interoperable. Rather than creating a whole new database the data is exposed in different ways so that items can be discovered and borrowed from within tools that patrons are already using (Google Scholar, BlackBoard, etc.).

Limitations on staff time and resources would make a one-time migration to a new product very difficult to support. Future changes are more likely to be a series of steps, not one huge leap.

We need to be realistic. Staff resources are very constrained and the level of customization and innovation must be balanced with the reality of a sustainable business model. New modules won't be the magical solution.

Social software integration

- Users are more interested in sharing, more involved in community systems.
- New users are more interested in emerging technologies. What is the impact on the user expectations in 3-5 years?
- Student's expectations are of mobility. They expect to be able to do their work from portable devices.
- How do we get our resources where the users are? We need to be focusing on building where students are, not focusing on the library needs. Facebook, Google, Blackboard, etc.
- Starting over with new tags in a discrete system will take time to get enough tags to make an impact. Better to take advantage of existing tags from LibraryThing or Delicious—rather than trying to start from scratch. We need to be pulling from the open groups that already exist.

PROCESS TIMELINE:

There is no timeline set for the discussion of options for the next ILS. We have no specific end date in mind, and no release date for the next big change from ExLibris. The CARLI Board has asked us to talk to as many constituents as possible regarding both the public search and discovery functionality and the staff systems.

The Director's meetings are the first step in the process. The CARLI Board will be discussing this topic at their meetings. CARLI will share the minutes from the Next Generation ILS discussions with the meetings with the Board and the Governing Directors. Directors should feel free to send additional comments to Susan Singleton or Mary Case.

During the spring of 2009, the I-Share Users' Group and the various I-Share teams will take the lead in gathering information from operational staff for the functional requirements of the next ILS. These conversations will be held in conjunction with the spring forums.

As the process proceeds, CARLI will follow up with a survey group to gather patron input. This will be done by an outside agency to ensure that the results are unfiltered by CARLI or library staff. It can be difficult to gather user feedback on future systems without specific examples. In addition, we may be able to review the user input we have regarding the strengths and weakness of current system.