

# I-Share Users' Group

## Plan of Investigation and Action, FY2011

August 13, 2010

IUG has scheduled the following meetings for FY2011:

July 14 (initial meeting at the CARLI office)  
August 13 (conference call)  
October 15 (CARLI office) November 19 (conference call)  
February 4 (conference call)  
April 15 (CARLI office)  
May 20 (CARLI office)

CARLI Board meetings:

September 17  
December 10  
March 18  
June 10

IUG will use the *ILS Project Timeline for Board* presented by Kris Hammerstrand at the July 14 IUG meeting as a broad framework for discussion, product(s) evaluation and consultation with CARLI staff. Discussions with the CARLI staff regarding system details, timeline changes, consortium needs, xC and URM developments, etc. will be held at each IUG meeting. As substantive decisions are discussed or finalized, IUG will present concrete recommendations to the CARLI staff and Board as appropriate.

The context for IUG participation will be advisory, based on ongoing discussions, member library priorities as identified by IUG and direct evaluation of specific product developments. IUG will not be engaged in an "RFP" type of evaluation of vendors and products.

Key discussion context for FY2011:

- Make specific recommendations on Voyager as key developments are accomplished and reported by CARLI staff. Assess Voyager 8 features, options and requirements including the complete replacement of WebVoyage Classic.
- URM - Provide feedback on the results of focus group reviews of URM by CARLI Staff. View demonstrations and/or participate in conference call(s) with Ex Libris concerning URM development and advise the CARLI staff and Board as appropriate.
- Monitor status of xC development related to completed functionality, timeline for future development and enhancements (short term, long term), and the viability of the product for resource sharing in the CARLI environment. IUG will initiate additional product demonstrations and conversations with xC development staff and provide feedback to the CARLI staff and Board as appropriate.

- Evaluate VuFind development and its potential viability as an alternative to WebVoyage.
- Discuss additional options and current developments such as Kuali OLE, WorldCat Local, and OCLC's Web-Scale Management Services.
- Assess the impact of the UB Standardization Policy.
- Resource Sharing
  - Define future vision of "resource sharing" in I-Share and CARLI.
  - Provide recommendations on the enhancement and expansion of resource sharing services in I-Share and to the entire CARLI membership.
  - Evaluate the organization and optimization of the current union catalog as part of any future ILS development.

Other specific tasks to be completed in FY2011 are:

- Present mid-year informational webinar to the I-Share membership on:
  - Current IUG work
  - IUG discussions with the CARLI staff regarding ILS timeline and development
  - Update on xC, URM, VuFind development
  - Possible options that IUG is considering and/or recommending
- Develop specific plan for communicating with IUG Teams, CARLI Working Groups and I-Share libraries.
- Collaborate with IUG Teams and CARLI Working Groups on relevant initiatives and projects.
- Initiate tasks or specific projects in response to CatER recommendations. If no action is to be taken, communicate decision and a review of IUG discussions to previous members of CatER, ICAT and I-Share libraries.
- Provide mid-year and end-of-year report to the CARLI Board regarding IUG work in FY2011 and observations/recommendations/plans for FY2012.