

April 10, 2013

To: SOPAG

From: Council of University Librarians

Subject: SPOT 3 Subgroup to Investigate a Shared ILS/Resource Management System for UC Libraries

CoUL discussed the March 15 memo from SOPAG via the SPOT 3 Subgroup during our March conference call. Instead of moving forward with the suggested process outlined in that memo, CoUL requests that SOPAG charge the SPOT 3 Subgroup to 1) having developed and gathered the necessary background information, assess the feasibility of implementing a shared next-generation ILS or Resource Management System (RMS) for the UC Libraries and 2) make a recommendation to CoUL based on this assessment.

Below are the elements of the SPOT 3 charge we identified.

Assumptions

- The time frame for implementing a new system is up to 3 years, to accommodate campuses that need to migrate to a next-generation system the soonest;
- While maximum benefit for shared technical services might only be achievable with 100% participation by UC campuses, that is not required for this effort. Stated another way, not all campuses should be required to participate in order to get value from a shared system. So if, for example, only a few campuses are interested in sharing an ILS, then it is worth continuing the investigation;
- Each campus is on a unique schedule for migrating to a new system, if ever;
- Contracting with external consultant(s) is an option, to help the group keep its work moving quickly. If SPOT 3 believes hiring a consultant would be useful, a separate recommendation should be prepared and submitted to SOPAG and CoUL.

1. Environmental scan

- Review the next-generation ILS/RMS product market and identify products with support for consortia, including both locally run and hosted solutions, and commercially available and open source software. Earlier investigations can be updated for this purpose, but open source products should be added as appropriate;
- Evaluate adoption of these new systems by library consortia and in large university libraries;
- Investigate the attributes and benefits of the new products with most potential for UC;
- Establish the status of each campus with regard to its current ILS – what is in place now and what plans exist to migrate?; what critical dependencies exist with external campus or 3rd party systems (purchasing, student information systems, etc.)?;
- Determine which campuses are interested in pursuing a shared ILS/RMS system, and describe their short-term priorities and time frame.

2. Analysis

- Enumerate NGTS recommendations that might benefit from a shared back-end business system;
- Research how next-generation ILS/RMS systems support collaborative workflows;
- Document how candidate systems could facilitate collaboration, based on evidence from other consortia and examples from our NGTS pilot projects;
- Prepare recommendations for CoUL on the feasibility of a shared next-generation ILS/RMS, and a process to move forward.

The group should submit a report of its findings and recommendations for next steps (i.e., the process to move forward as identified in the analysis step, such as a formal requirements definition process, RFI, RFP, or pilot of one or more products) no later than December 31, 2013.