

SVLS Administrative Council Meeting Agenda

Mountain View Public Library
585 Franklin Street
Mountain View, CA 94041
Gossamer Conference Room
(Map Enclosed)

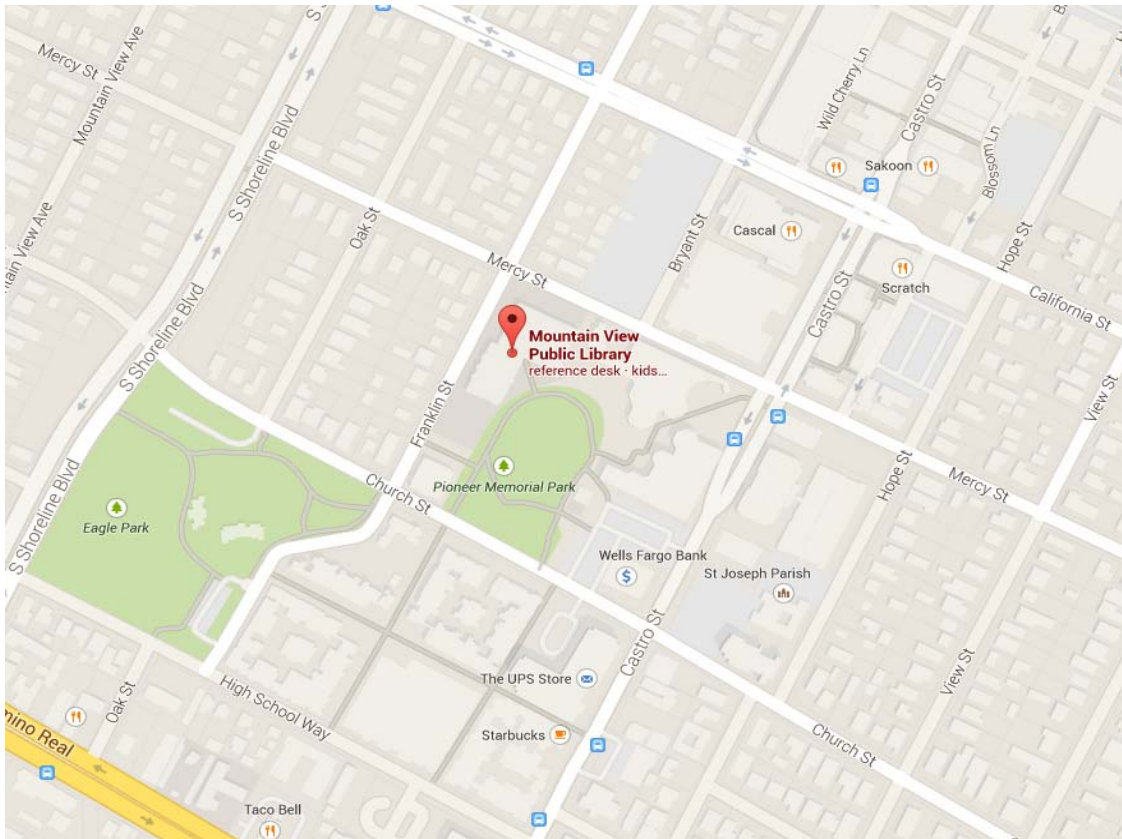
Conference number: 800-503-2899
Access code: 3495538

Friday, July 22, 2016

10:00 a.m.

- | | | | |
|------|---|-------------------------|--------------|
| I. | Call to Order and Introductions | Keith | |
| II. | Adoption of Agenda (Action Item) | Keith | |
| III. | Approval of the January 29, 2016 minutes (Action Item) | Keith | Attachment 1 |
| IV. | New Business | | |
| | A. 3M Cloud Library Proposal | Frost/Goyal | Attachment 2 |
| V. | Old Business | | |
| | A. Unified Platform Feasibility for SVLS | | |
| | 1) Accept the SVLS Unified Platform Study prepared and presented by Melissa Stockton, Quipu Group LLC (Action Item) | Frost | Attachment 3 |
| | 2) Next Steps Discussion | Frost | |
| | 3) Approval of \$14,000 for the Quipu Study and \$1,000 in PLAN staff time to be paid from the SVLS reserve fund of \$176,881 (Action Item) | Frost | |
| VI. | Reports | | |
| | A. <i>Silicon Valley Reads</i> | Howe | |
| | B. PLP Executive Committee: Updates | Frost/Macek/Ziesenhenne | |
| | C. Report of System Administration | Frost/Jackson | |
| VII. | Agenda Building and Selection of Next Meeting Date | | |

- VIII. Public Comment (Individuals are allowed three minutes, groups in attendance five minutes. It is a system policy to refer matters raised in this forum to staff for further investigation or action if appropriate. The Brown Act prohibits the Administrative Council from discussing or acting on any matter not agendaized pursuant to state law.)
- IX. Announcements and Reports from Libraries
- X. Adjournment



Parking- The Library is on Franklin Street, between Mercy and Church Streets. Parking is available in the Franklin Street parking lot, on Franklin Street itself, or in the underground parking beneath the Library on Mercy Street.

Travel Instructions -

From 85 North: Take El Camino Real North exit. Follow El Camino Real until you reach Castro Street. Right turn on Castro Street. Left on Mercy Street.

From 101 North: Take the Shoreline Boulevard Exit. Right on Shoreline Blvd. Left on California Street. Right on Franklin Street.

From 101 South: Take the Shoreline Boulevard Exit. Right turn on Shoreline Blvd (which will lead you back over 101). Left turn on California Street. Right turn on Franklin Street.

From 237 - 237 becomes Grant Road when it intersects with El Camino Real. Right turn at El Camino Real. Right on Castro Street. Left on Mercy Street.

From 280: Take 85 North exit. Take the El Camino Real North exit. Right turn on Castro Street. Left turn on Mercy Street.

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Castro & California VTA 35, VTA 51, VTA 52

California & Franklin VTA 35

California & Shoreline VTA 34, VTA 35

El Camino & Castro VTA 22, 522

VTA Light Rail - Mountain View – 902

Caltrain - Mountain View

SVLS Administrative Council Meeting

Action Minutes

Friday, January 29, 2016

Rinconada Library
1213 Newell Road
Palo Alto, CA 94303

Council:

Hilary Keith, Chair, Santa Clara City
Rosanne Macek, Mountain View
Nancy Howe, Santa Clara County Library District
Monique leConge Ziesenhenné, Palo Alto

Staff:

Susan Hildreth, PLP/SVLS
Terry Jackson, PLP/SVLS

- I. **Call to Order:** The meeting was called to order at 10:08 a.m. by Chair Hilary Keith.
- II. **Adoption of Agenda:** The agenda was approved as distributed. (M/S Howe/Ziesenhenné)
- III. **Approval of the Minutes:** The minutes of the September 18, 2015 meeting were approved as distributed. (M/S Ziesenhenné/Howe)
- IV. **Old Business:**
 - A. **PLP Strategic Workshops/Findings:** Susan Hildreth reviewed the findings and provided the Council with initial staff analysis. Staff will follow up with a document that starts to frame how PLP moves forward.
 - B. **SVLS Fund Balance Update and Discussion:** Susan asked if the Council had ever considered a shared ILS now that all of the members were with Innovative. The Council wanted very much to explore this idea and asked Susan to find the appropriate expert to provide the feasibility analysis. This effort would be funded using the SVLS fund balance.
- V. **Reports:**
 - A. **Silicon Valley Reads:** Rosanne Macek shared the brochure from this year's Silicon Valley Reads with the theme of *Chance of Rain?* Nancy Howe reported that the San Jose Library Foundation will no longer be the fiscal agent and that Silicon Valley Reads was looking at their options. Susan said she would follow up to see if any of our organizations could provide this service.
 - B. **PLP Executive Committee Updates:** The PLP Executive Committee met on January 21st and Rosanne, Monique Ziesenhenné and Heidi Murphy all participated. The Executive

- C. Committee authorized Susan to secure pricing for the Gale product Analytics on Demand for all PLP member libraries. The 2016 PLP Library Leadership programs are underway, and this year a Middle Manager Professional Development group is a new addition.
 - D. **Report of System Administration:** Susan and Terry Jackson shared information from the January 12th State Library meeting with the CLSA systems. The purpose was to develop and identify activities, initiatives, programs and projects to be potentially funded with the new monies in the Governor's proposed budget, which have been earmarked to strengthen regional systems. High on the list was the use of the student ID number to serve as a library card and an impact measurement analytical tool that could provide statewide data.
- VI. **Agenda Building:** The next meeting was set for Friday, June 3, 2016 at the Mountain View Public Library, and the shared ILS feasibility discussion will be an agenda item.
- VII. **Public Comment:** No public comment.
- VIII. **Adjournment:** The meeting was adjourned at 11:40 a.m.

Dear SVLS Administrative Council,

Los Gatos Library has just signed onto 3M Cloud Library, a service that makes it even easier to download eBooks/eAudiobooks with single sign-on and integrates eBooks from Overdrive and One-Click Digital. Browsing is also simple and customizable for libraries to feature specific collections. The fee for 3 years for Los Gatos Library, with a population of close to 30,000, is \$2000 per year, with a one-time \$500 installation fee. The app is very easy to use on Android and iOS and will soon be available on Chromebooks.

One really unique feature offered by the Cloud Library is "Cloudlink," which links your library with other libraries to share collections. Cloudlinking enables libraries to provide more eBook/eAudiobook to patrons, creating shorter holds queues and generating more use of content owned by libraries. As an example, if I was looking for a title that my library did not own but available with through another library, I would still be able to check it out and not have to sign out and into another e-lending platform or possibly wait through a holds list. Priority for titles would of course still go to the owning library's patrons and there is a reporting feature that is available to show patron usage varying by branch and whether the patron is a member of that particular library.

On the whole, the Cloud Library seems like it would be most advantageous if there more libraries on board so a patron could potentially access a shared and larger collection, using one library card. I am wondering if this was something that could be considered for the PLP consortia to sign on together as a project to share resources or perhaps even piloted with the SVLS members. Currently, the SVLS member libraries signed onto the 3M Cloud are Los Gatos, Santa Clara County, and Sunnyvale.

I would greatly appreciate if this topic could be added to the July 22nd agenda. I will also gladly find out more information from 3M if you have additional questions.

Thank you for your time and consideration,
~Dolly

Dolly Goyal
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<http://library.losgatosca.gov/>

July 11, 2016

Silicon Valley Library System Unified Platform Study Consultant Report

Introduction

Quipu Group, LLC was hired by the Pacific Library Partnership to complete a Unified ILS Platform Study for the Silicon Valley Library System (SVLS). Melissa Stockton was the Consultant from Quipu Group who completed the project. The study included an evaluation of the current ILS activities of all seven SVLS libraries, with a final report to include:

- Potential ILS-related sharing options
- The benefits and/or drawbacks for each option
- Recommendations on possible applications or systems that could be shared

A survey document was created which included questions related to the current ILS practices of the SVLS Libraries to help determine any potential problem areas related to sharing an ILS. The survey questions covered information related to circulation, cataloging, discovery layers and resource sharing now in place in each library. Melissa Stockton made an on-site visit to each library, during two trips to the SVLS region in May and June, 2016 to go over the survey questions and talk with staff at each library.

What we Learned

Each section of the survey was included for a specific reason and meant to shed light on the similarities and differences among the libraries as well as the resources which might be available in a shared-ILS environment. A separate spreadsheet, with all of the survey questions and responses has been created and made available with this report.

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Phone: 800-764-8018 • Fax: 877-759-0845 • www.quipugroup.com

Several items in the survey were included to give us an idea of the areas which might make sharing an ILS more difficult or require more changes within one or more of the libraries. Other items provided a look at the flexibility which would be required for any ILS that was selected as a shared system.

The sections of the survey included:

- Patrons/Circulation Rules
- Bibliographic and Item Records
- Discovery Layer/Public Access
- Third Party and External Interfaces
- Resource Sharing
- Staff Resources
- Misc.
- Sizing Information

The survey included a few items to provide a sense of the size of each library as well as the size of the group as a whole. The chart below shows information regarding the number of bibliographic, item and patron numbers and also includes a total circulation count taken from the 2014/15 statistics available from the California State Library. The ILS vendors price their system differently and the figures below are used by some vendors to determine costs for software purchasing and maintenance as well as being used to determine the hardware configurations which would be required.

CHART 1: SVLS Library Size Statistics

Library	Number of Bibliographic Records	Number of Item Records	Number of Patron Records	Total Circulation (CSL 2014/15)
Los Gatos	109,556	127,534	29,793	607,494
Mountain View	318,570	324,828	99,825	1,563,487
Palo Alto	320,000	285,000	55,000	1,499,406
San Jose	431,127	2,182,765	511,904	9,831,284
Santa Clara City	350,000	470,000	111,000	2,491,553
Santa Clara County	516,843	1,927,355	269,170	8,912,348
Sunnyvale	324,739	318,036	120,417	2,576,329
TOTALS	2,370,835	5,165,518	544,442	27,481,901

The SVLS libraries are currently utilizing several different ILS and Discovery Layer solutions. The chart below details the products used by each library and where the servers for the ILS are hosted. The ILS being used and the hosting choices made give a sense of the types of staff expertise available within the group. Libraries running their own system have IT staff which would not be required for those utilizing a vendor-hosted solution.

CHART 2: SVLS ILS and Discovery Layers

Library	Current ILS	Self-hosted or Vendor-hosted	Current Discovery Layer
Los Gatos	Koha	Vendor (ByWater)	Koha PAC
Mountain View	Sierra	Self-hosted	Encore & WebPAC
Palo Alto	Sierra	Vendor (Innovative)	Encore & WebPAC
San Jose	Sierra	Self-hosted	Encore
Santa Clara City	Sierra	Vendor (Innovative)	Encore
Santa Clara County	Sierra Migrating to Horizon in 2016	Self-hosted	BiblioCommons
Sunnyvale	Sierra	Vendor (Innovative)	Encore

Barcodes & Other Local Fields

Barcodes for patrons and items are an extremely important piece when thinking about merging records from different libraries. The good news for SVLS is that there is no overlap as far as the number ranges used for patron and item barcodes. Although there are different formats in use, all of the large ILS solutions can handle multiple formats and multiple number ranges.

Each library has a number of special fields they use in patron and bibliographic records. For example, many of the SVLS libraries utilize a field in the patron record to indicate the geographic location of the patron. Several of the libraries are using the same fields in bibliographic records for different purposes, however, this is something that can be handled before records are merged. For both patron and bibliographic records, there would need to be discussion and agreements made between libraries prior to any merging activities, however, these issues can be handled without any libraries losing important data.

System Parameters

The types and number of parameters used by the libraries such as locations, item/media types, patron types and loan rules was reviewed. The responses in this area give us an idea of the similarity and differences between the libraries for describing their items and determining loan periods. This is an area which can complicate sharing an ILS and an area in which there are a variety of methods or options for maintaining these settings.

There were many similarities found among the libraries as far as the loan rules themselves, with 5 of the 7 libraries offering a standard 3-week loan period for the majority of items. Loan periods and other limitations placed on patron circulation activities vary among the group more when you look at special materials such as DVDs and laptops. This project did not go into the details of the fines and fees and other specific circulation practices for all material types. With this survey, we were looking at ILS settings such as locations and item types which provides information on the flexibility and robustness required for any ILS to be shared by the group. A shared ILS would require that each library be able to set their own policies and maintain some, if not all, of the parameters now being utilized. The results suggest that there are a number of parameters which could be standardized across the group which would reduce the number of settings required and making maintenance easier and more consistent.

Special Features

The survey asked about the use of special features offered in an ILS such telephone notification & renewal, floating collections, and authority control to learn if all or most SVLS libraries utilize these features, and how. These special features can affect the cost of an ILS as well as indicating where an ILS will need to provide a solution on a library-by-library basis. With a shared ILS, authority control decisions need to be made at the system level and not the local library level since it affects bibliographic records which are shared among the group. Since the SVLS libraries have different practices and utilize different vendors for authority work, this is an area which would need to be discussed and a single methodology selected.

All of the libraries would not need to agree upon the use of telephone notification and renewal features, however, this is an area which would require phone lines and most likely a server dedicated to each library utilizing the service. Floating collections are also not an area which the libraries would have to agree, however, the survey results indicate that any shared system would require that materials in specific library/branch combinations be the only items allowed to float. Since only two of the SVLS libraries have floating collections, any shared system would need to be able to float the appropriate items only within that appropriate library.

3rd Party Integrations

There were several items in the survey which relate to the integration with 3rd party products. The methods of integration vary for the different 3rd party products, however, many utilize the SIP2 protocol or APIs from the system. The use of SIP2 or APIs can affect the pricing for an ILS and the variety of different connections required can make a migration and maintenance more complex.

While all of the SVLS libraries use RFID, the patron authentication methodologies for accessing secured online resources are very different, ranging from EZ Proxy (hosted and in-house) to

utilizing a City IT solution. PC print and time management systems are other areas where the SVLS libraries have implemented different solutions from different vendors.

It is unlikely that any library would be required to change their vendors for authentication or PC print/time management, however, it may be possible to pursue group discounts in these areas which could help reduce the costs for all of the libraries. That being said, if SVLS were to move ahead with a shared ILS, the implementation and testing for the variety of different 3rd party products would need to be included in planning a migration.

Resource Sharing

Questions about current resource sharing activities and the delivery methods used were especially important to discuss during this project. This is an area which would be affected the most if a shared ILS is implemented. Five of the SVLS libraries are a part of LINK+ and the courier service which transports materials for this resource sharing service. The libraries with multiple branches have services in place to move materials within their own library system.

CHART 3: SVLS ILL Activity

Library	Materials Sent to Other Libraries	Materials Received from Other Libraries
Los Gatos	No ILL	No ILL
Mountain View	16,248	15,184
Palo Alto	0	6,429
San Jose	41,169	38,684
Santa Clara City	11,955	8,378
Santa Clara County	475	317
Sunnyvale	7,277	13,319

The statistics utilized in the chart above are from the 2014-2015 California State Library and can be found through the website: <https://ca.countingopinions.com>.

During the interview with each SVLS library, all of the libraries stated that they were very open and interested in resource sharing among the SVLS libraries. Those libraries already involved in ILL activities, through OCLC and/or LINK+ already have staff and procedures in place for the sending and receiving of library materials.

Potential ILS-related Sharing Options

There are a wide variety of library consortia in the United States, reflecting diverse models of resource sharing. This report will describe three types of sharing options, all related to sharing an ILS and all are options for the SVLS libraries.

1. Present a Unified Public Interface

Presenting a unified public interface would not put a unified ILS in place but would bring the SVLS libraries into one search interface while maintaining separate ILS platforms for each library. There are currently two options available for presenting the holdings of multiple libraries in one public search interface, without sharing an ILS -- resource sharing systems or a shared discovery layer.

Resource Sharing System

One method for presenting a unified catalog to SVLS patrons is through resource sharing systems such as INNREACH from Innovative Interfaces, OCLC WorldShare or Relais. These resource sharing systems provide a union catalog for patrons to search and request items as well as providing management features which route requests to appropriate libraries. The LINK+ system uses an INNREACH system to provide the patrons of member libraries a union catalog of materials from all the libraries and gives patrons the ability to request materials from any member library without staff mediation. OCLC WorldShare offers a group or union catalog, using OCLC holdings information, to present the materials available from all members of the group. Texas has an implementation of this system which employs a group catalog on OCLC and OCLC Navigator to manage the requests made through the system. All of the libraries must be OCLC members and keep their holdings information up-to-date in OCLC to facilitate the ILL activity. Relais is another resource sharing system, similar to INNREACH, but was not created by a specific ILS vendor. The cost of a Relais system for SVLS would most likely be somewhere between the pricing for solutions using OCLC and INNREACH. Implementing Relais would not require the SVLS Libraries to belong to any other organization, such as OCLC, however, the system does not currently integrate with Koha which may require additional monies for the development of that connection. Relais is a smaller company than either OCLC or Innovative Interfaces, however, their software is currently being used by groups larger than SVLS.

Each of the resource sharing systems offers different levels of functionality on the library side, depending on what ILS is in place. For example, INNREACH provides seamless integration with any Millennium or Sierra system. This means that bibliographic and item records are automatically uploaded to the INNREACH system and requests from patrons are placed within the local ILS by the system. If you are using a different ILS, then there is a nightly process implemented to update the bibliographic and item records from the local ILS to INNREACH and library staff utilize an INNREACH-specific interface to receive and fulfill holds from other libraries. This is also true for the other resource sharing systems, some libraries are able to have the requests from the system automatically placed into their local ILS while other libraries must access a separate interface to manage the requests placed. These resource sharing

systems rely on standards such as SIP2 and NCIP and have been improving as these standards are more fully implemented by each ILS vendor.

Pros/Cons of Resource Sharing System

The resource sharing system option works well for large, diverse groups of libraries. The system is usually included as a link or menu option in the local library catalog, requiring patrons to specifically select this as an option for their searching. Libraries experience a much higher level of interlibrary loan when they are a part of a resource sharing system, as evidenced by the high number of ILL transactions for the SVLS libraries now participating in LINK+, as seen in Chart 3, above. Resource sharing systems are also a second layer as far as costs for the libraries involved. Libraries must still maintain their own ILS as well as paying for their share of the cost of the resource sharing system. The delivery of materials between libraries must be handled separately by the libraries involved. Since the SVLS libraries now contract with PLS for inter-jurisdictional delivery services, this contract would need to be expanded to offer more frequent delivery stops for each SVLS library.

For SVLS, the implementation of a resource sharing system has more issues than positive potentials. The costs associated with most resource sharing systems would be high and would not necessarily give any of the libraries a way to reduce costs in other areas. Since 5 of the 7 libraries are a part of LINK+ now, instead of implementing a separate INNREACH system, the two libraries that are not members could join and discuss the possibility of creating a sub-group within the LINK+ system. Implementing an OCLC WorldShare group may be the least expensive option, however, Los Gatos would be incurring the highest cost for this option since they are not currently OCLC members.

Shared Discovery Layer

A shared discovery layer would also bring the holdings from all SVLS libraries into one public searching interface while maintaining local control of the ILS itself. Discovery layers are a more recent development than resource sharing systems and there are currently a limited number of options available. Discovery layers which could be implemented by SVLS libraries, using different ILSs include Bibliocommons and VuFind. Chart 2, above, lists the discovery layers now in use at each SVLS library.

BiblioCommons (<http://bibliocommons.com>) is the most popular discovery layer for public libraries today. It offers all of the patron functionality found in the traditional PAC as well as simplified access to online materials such as ebooks and eaudio. For groups of libraries using different ILSs, BiblioCommons currently does not offer a true integrated search experience. The results from each library would be included on a separate tab for the user. When a user performs a search, the results are not de-duplicated. The user files are also not integrated,

making the request process potentially more laborious for the patron. Requests for materials can be automatically placed into the local ILS, which does not require any staff intervention.

VuFind (<http://vufind-org.github.io/vufind/>) is an open source software package, originally developed by Villanova University. VuFind provides a consolidated search interface for a group of libraries, integrating all of the bibliographic and item information from the member libraries as well as other online resources. VuFind has been implemented to function with a variety of different ILS systems, including all of the ILS solutions utilized by the SVLS libraries. The functionality between VuFind and the local ILS is controlled by programs which are called “connectors.” The sophistication of the connector for a specific ILS will be dependent on the capabilities of the ILS and the work that has been done by the developers to create searching and requesting functionality. Although the majority of implementations of VuFind have been for individual libraries, large groups such as I-Share from the Consortium of Academic and Research Libraries in Illinois (CARLI) have a VuFind catalog in place which brings together the holdings from a variety of libraries and ILS solutions. Enki, the statewide eBook platform from CALIFA utilizes VuFind to authenticate users, from many different libraries, for access to the collection.

Since it is open source software, there is not cost associated with retrieving and implementing the software, however, it is fairly complex and would require staff and computing resources from the SVLS libraries or monies paid to a service provider to configure and maintain the system.

Pros/Cons of a Shared Discovery Layer

The implementation of a unified public interface for SVLS libraries could include all of the members or just a sub-set and would not require any library to change their ILS for the group. The experience with a shared discovery layer option would mean that the SVLS libraries would be able to stop supporting their local catalog or discovery layer, a cost saving measure for most of the SVLS libraries. Implementing BiblioCommons may be cost prohibitive for some SVLS libraries and will not provide a true union catalog. VuFind has the ability to integrate with any ILS and provide a seamless process for request placement and fulfillment, however, there may be some development required before it could handle all of the ILS interfaces. VuFind would also require local technical expertise from the SVLS libraries or a service provider to maintain.

2. Share an ILS

Sharing an ILS is a step above a unified patron interface and what this project was meant to investigate. Not only does a shared ILS integrate the bibliographic and item information for a group of libraries, it also provides a simpler and deeper experience for patrons. Sharing an ILS requires the libraries involved to make a number of group decisions and when libraries also

adjust loan periods and other policies to be more consistent among the group, it makes it easier for patrons. There are many levels of sharing which can happen in the ILS. Libraries can share cataloging and circulation activities while separating the acquisitions or almost any combination of shared versus unique that they wish.

At minimum, a shared ILS means that one set of hardware is utilized and the bibliographic records from all of the libraries are combined into one database. Individual library holdings are represented through the item information. This requires that decisions regarding the technical infrastructure for the ILS be determined by the group, either housing the equipment at one of the member libraries or hosting it with a vendor. To be successful, a shared catalog requires that the group create and follow similar practices in their cataloging, especially in the selection and use of bibliographic records.

There are currently 2, but soon to be 3, ILS solutions in place within the SVLS group, Koha, Sierra and when Santa Clara County completes their migration, Horizon. You can find examples of libraries sharing all of the large ILS solutions, including the ones currently represented in the SVLS group as well as Symphony (SirsiDynix), Polaris (Innovative Interfaces) and CARL.X (The Library Corporation). Each of these systems offer different features for maintaining a system for multiple libraries, although some provide more flexibility and more complete separation for each library than others.

The Polaris system is the one ILS which was created from the beginning to work in a consortial or group environment. In Polaris, settings and parameters can be defined at the consortia, library or branch levels. Not only does Polaris allow each library to maintain separate acquisitions and circulation information, but it also has some workflow capabilities not found in every system such as limiting lists of locations or item types seen by staff to those specific to each library. This means that staff does not have to look through all of the options available in the system for each field but only sees those codes relevant to their own library.

The other systems, including Koha, Sierra, Symphony, and CARL.X all allow individual libraries to maintain separate acquisitions functionality and library-level circulation settings, however, they are not always as easy to maintain. For example, in Sierra, the locations for all of the libraries are kept in the same table and those belonging to a specific library usually start with a code assigned to that library. This does not mean that these systems cannot accommodate special rules or settings for an individual library, it just means that the group may have to be very conservative about the staff allowed to access system administration functions. Also, the system selected will determine what areas the group will need to make decisions together as opposed to allowing each library to make their own decision. As an example, Sierra has some limitations in the number of codes which can be used in certain areas of patron and item

records, such as item or media type. In this example, SVLS would need to agree on a specific list of item types that would then be used for all of the libraries.

Below are examples of group or unified ILS solutions using the major ILS systems.

CARL.X

SPLASH in California – 4 libraries sharing a CARL.X system (currently hosted by Solano County Library)

<http://ls2pac.snap.lib.ca.us>

Koha

AspenCat in Colorado – 103 libraries sharing a LibLime Koha system (hosted by PTFS)

<http://catalog.aspen.cat.info/>

Polaris

Illinois Heartland Library System in Illinois – 471 libraries sharing Polaris system (hosted by Consortium)

<http://share.illinoisheartland.org/>

Sierra

Mid-Hudson Library System in NY – 66 libraries sharing a Sierra system (hosted by Consortium)

<http://search.midhudsonlibraries.org/iii/encore/?lang=eng>

Symphony

Montana Shared Catalog – 177 libraries sharing a Symphony system (hosted by State Library)

http://mtsc.sdp.sirsi.net/client/en_US/default/

Choices for hosting the technical infrastructure for a shared SVLS ILS include:

- One member hosts systems
- Contract with PLS/PLP for hosting system
- Contract with vendor for hosting system

It is common to have one of the larger libraries in a group provide hosting for the system. For SVLS this would mean either San Jose or Santa Clara County. Although both libraries have technical staff that could handle the support and maintenance for the underlying systems, it does place a large burden on the selected library and the group would need to include compensation for these activities when dividing costs among the group for the ILS.

PLS maintains a shared Sierra system for 35 libraries and has a great deal of experience in this area and also has the appropriate IT expertise. The PLS system is a very good example of a

shared Sierra system with a BiblioCommons discovery layer for the public. Each library can customize the headers and basic style for their own patrons while displaying the holdings from all of the member libraries. If SVLS decided to use PLS as their hosting provider, a contract or service agreement would be required, outlining the specific services provided to the SVLS libraries. If an arrangement were made with PLS, then there would not be an additional IT burden placed on any one SVLS library and it may offer a less expensive solution than hosting through a vendor.

Libraries have been moving to vendor-hosted solutions at a fast pace. We have seen many small and medium-sized libraries move their system to the vendor for maintenance as well as some of the larger libraries and consortium. One vendor indicated that up to 75% of their new sales and customer renewals are including a vendor-hosted solution. When hosting a system, the vendors often offer redundancy in power and internet connections, a secure facility, a 99% plus reliability and geographically separate backup locations. The costs for hosting differ, however, it has proven very cost efficient for libraries due to the increased security and connectivity from the vendor which is very expensive for libraries to replicate.

When patrons can request materials from all of the libraries within a shared ILS, the amount of materials that need to be sent between the member libraries increases dramatically.

In a White Paper from Lori Bowen Ayre (Galecia Group) in 2011, Ms. Ayre notes:

“Using the Georgia PINES system as an example again; lending went up 40% between their 275 member libraries after implementation of their Evergreen system in 2007.” (Lori Bowen Ayre, The Galecia Group, 2011. *White Paper: Why Sharing a Library Management System Makes Sense*.

http://library.sd.gov/ACS/TECH/2012_Ayre_WhyASharedILSMakesSense_WhitePaper.pdf

Although borrowing and lending through LINK+ may go down for those participating libraries when a shared SVLS ILS is implemented, the total number of items being sent to and from these libraries will still increase. See Chart 3 for information on current ILL activity within the SVLS libraries. Although the large libraries involved in a shared system often see the highest numbers of requests, the small libraries also experience an increase in the amount of materials which are sent to other libraries, impacting both in different ways. Santa Clara County and San Jose represent the largest libraries within SVLS and any system in place would need to allow these libraries to determine what is shared and what is maintained only for local patrons. Los Gatos would also have to prepare for a shared system since they have a small staff and are currently not participating in resource sharing activities of any kind.

Giving patrons access to larger numbers of materials is one positive aspect of a shared ILS, however, it must be backed up by a quick and efficient delivery system. The libraries involved

in the shared ILS need to have a courier or other delivery service in place which can move materials between the libraries in a 2 to 3-day period or less. Since the patron no longer needs to worry about where the materials are coming from, they expect that all materials they request will be delivered quickly.

Pros/Cons of a Shared ILS

As with a unified public interface, a shared ILS could include all of the SVLS libraries, or a subset. There would be cost savings for both hardware and software. The hardware savings are fairly obvious—one machine versus many, however, software costs could also be decreased. The majority of the ILS vendors include a basic software charge which each library is currently paying. When purchasing a shared system, this charge is only incurred once for all the libraries. For those vendors which charge for their software by the number of staff user licenses provided often have tiers for these costs and so the more staff users involved, the lower cost per user.

The major advantage of a shared ILS is the additional resources which are made available to users. For libraries of all sizes, a shared ILS presents more titles, more formats and more copies of popular titles. All of this is available to the patrons in one interface. The libraries can determine the extent to which they would like to share and so can keep some unique policies and procedures while offering greater access to materials to their public.

When sharing an ILS, if the group does not contract with a 3rd party for support, then responsibilities for system administration, upgrade/update coordination, training, and help desk support is the responsibility of the group. SVLS could assign different tasks to different libraries, depending on the local expertise available. Since staff is always limited in public libraries, you often end up with the person that is an expert in one area also having to deal with other areas in which they are not as effective. For example, the cataloging staff might take on the role of main help-desk contact because they are familiar with some of the system administration area but then end up having to troubleshoot ILS problems in every department of the library. In a shared ILS, one library may provide the cataloging expert(s) while another would provide the circulation expert(s), giving each area someone that knows the specific functional area of the ILS to the detail level and able to provide better support.

Often when consortia share an ILS, they present the consortial name or brand for the public interfaces. This can be seen online in the discovery layer as well as on marketing materials. There is currently not a known SVLS “brand.” Although the SVLS library directors and some staff are aware of the consortia, many of the other library staff members are not aware of the group. This is even more so when you look at the community recognition of the SVLS name. The implementation of a shared ILS would allow SVLS to begin creating a brand, if so desired.

On the positive side, this survey found that there are no overlapping numbers used in the patron or item barcodes currently in use by the SVLS libraries. Also, many of the loan rules are similar and could be standardized across the group without forcing major changes for any of the libraries. One issue which can be seen as the negative side of the equation, is that each library in a shared ILS would lose some local autonomy in their decision making. The leadership group would be making decisions which would be best for the entire group, and not just for one library. In PLS, the Administrative Council recently made the decision to stop charging fines for children, although not every library wished to make this change. The end result was that those libraries that wished to continue to charge fines to children would be required to add those fines manually. Ultimately, those libraries went to their City Councils and have now changed their policies to match those of the other libraries. Other issues which would need to be discussed and addressed before sharing an ILS, and may mitigate some of the autonomy issues would be removing special collections from the resource sharing pool, such as individually purchased OverDrive titles and other materials that each library would want to maintain only for their location patrons. The variety of 3rd party interfaces and the current existence of both RFID and barcodes for items represent potential complications and would need to be discussed with any potential shared ILS vendor.

There are two main concerns identified by the consultant for sharing an ILS. First, finding a system that all 7 libraries can agree on may be difficult, especially Santa Clara County which has already been through 2 migrations in as many years. Second, a shared ILS would require that the group develop a quick and reliable delivery mechanism between the member libraries. The PLS courier service now used by each of the SVLS libraries could be expanded to provide the delivery mechanism necessary to support the movement of the materials which would be requested through the shared ILS.

3. Share an ILS and Combine Other Services

Sharing an ILS, opens up many other sharing opportunities to libraries, giving them easier methods for sharing or combining other services. Other resource sharing options include Technical Services, System Administration, Cooperative Collection Development, and Circulation Management.

Shared cataloging is fairly common for those libraries sharing a system, however, other technical services activities can be consolidated as well. When sharing an ILS, libraries can consolidate specific tasks to be performed by one library and create subject expertise across the group. Authority control is an example of an activity which requires specific skills to be done well. When sharing an ILS, if one library has an expert in authority control, that library can take on the responsibility for maintaining the authority file for the group. This not only ensures that

the authority work will be consistent among the libraries, it also frees up staff resources at the libraries not responsible for that work.

The System Administration duties for an ILS is another area which can be consolidated to a great extent. Many of the ILS options, while providing separate parameters for each library, also provide a single system administration module which allows all authorized users to update any of the codes and settings. In order to prevent a library from accidentally changing the settings for another library, the system administration duties are often limited to a small group of people that update this information for all of the libraries. Like the authority control example for cataloging activities, this is another area where a group can select the best staff from the member libraries to perform the system administration duties for the group. This saves staff time at the other libraries and also provides a safe and consistent method for updating system settings. High-level report is another area which can be consolidated. If SQL or API programming is required to create reports, the experts at one or two of the member libraries can provide this support to all of the libraries.

Consortium have been working on cooperative collection development projects for a very long time, however, ownership and cost issues continue to be a challenge. The most common collection development project involves a specific set of materials (e.g. reference materials) or materials from one provider (e.g. titles from OverDrive), with each library responsible for a subject area, type of material or genre. A shared ILS makes a higher level of cooperative collection development possible. At the basic level, groups sharing an ILS have implemented rules regarding the selection of new materials and simply check the union catalog before placing an order. The goal is usually to retain as many titles as possible but to limit the copies of each title. Other groups have taken this a step further and are looking at the union catalog as one source which needs to fulfill the needs of all participating libraries. The collection and circulation statistics available in a shared system can facilitate a higher level of cooperative collection development. The Orbis-Cascade Alliance (<https://www.orbiscascade.org/>) in Oregon is one of the consortia which have been most active in this area.

For Circulation Management, there are a variety of possibilities for sharing. Sharing display or other special collections is as simple as if moving them from branch to branch. If the ILS supports floating collections, then this feature could be turned on at a consortial level. Another area which is often combined in a shared ILS is library privileges through a shared or consortial library card program. The nice thing about a shared ILS is that the configurations in the system can be re-configured as new shared programs and processes are adopted.

Recommendations

This project was able to determine that there are no major technical issues related to the SVLS libraries moving forward with a unified ILS. You have an existing group of libraries which have worked together in the past and are interested in looking at more resource sharing options in the future. The next step in this process would be to discuss the sharing options available and decide how the group would like to proceed. If the group decides to move ahead with one of the ILS-related sharing options presented in this report, the consultant would recommend a few basic steps be taken which are outlined below.

Formation of Leadership Committees

Any ILS sharing project requires several committees or groups. The configuration and number of groups involved in a shared ILS vary. A top leadership group which has the final say on any group purchases and would also be responsible for agreements among the libraries and determining the financial arrangements for the purchase and support of the system. The library directors of the SVLS libraries could readily be made into the ultimate decision group for the consortia.

Other committees could be created depending on the level of resource sharing that is in place. A Cataloging Committee would be essential before, during and after the implementation of a shared ILS since bibliographic records from the libraries are merged and de-duplicated. This group would be responsible for creating and maintaining the rules for the group for the creation and editing of bibliographic records, as a beginning step. Circulation related committees can be helpful in both standardization of rules and fees as well as issues related to the retrieval and delivery of materials between libraries. A separate delivery-related committee is often extremely valuable. A committee for the public interface would be required if sharing a discovery layer or an ILS. This group may include staff from technical and public service areas of the libraries. Ad-hoc groups can be formed to work on updates/upgrades or to review new products or to work on specific projects related to any aspect of the system.

A contract with any third party vendor would require a formal organization as signatory, however, SVLS could contract with PLP for these activities, especially since PLP has been providing administrative support to the group already.

Sharing Hardware & Software Support

The hardware and software for the ILS will need support. This support can come from the vendor, the SVLS libraries themselves or another agency. Although the decision on where the hardware will be housed is not necessarily something that needs to be determined up-front, having this decision made would make the investigation of different options easier.

The hardware support will require a high level of IT expertise and a location which is robust enough in areas such as bandwidth, internet connectivity and power requirements to support access from all SVLS libraries.

Software support will include a variety of expertise and staff resources and includes areas such as system administration, coordinating the testing of upgrades, trouble tickets, and training. The chart below shows the number of codes currently in place for each library for locations and patron types. These parameters can be difficult to manage for a single library but can be extremely complex when dealing with a group.

Library	Number of Locations	Number of Patron Types
Los Gatos	57	9
Mountain View	82	38
Palo Alto	1379	32
San Jose	73+	27
Santa Clara City	150+	15
Santa Clara County	400	21
Sunnyvale	20+	5
TOTALS	2161+	147

Request Fulfillment and Delivery

It is strongly recommended that the libraries begin working on the workflows associated with request fulfillment and the method of inter-library delivery before any shared system is implemented. These are not simple issues and need to be worked out before materials from other libraries are made readily available to patrons. The multi-branch libraries within SVLS already have a method for moving materials between their branches which means that it is only the library-to-library delivery mechanisms which would need to be addressed.

Many of the SVLS libraries are already providing a great deal of support for ILL activities. Those libraries which currently experience little or no ILL activity will need to determine the staff resources and workflows that will be required to add or add to these services.

There are options which can be investigated for the delivery or courier system between the SVLS libraries. Expanding the PLS courier service now in place could be a fairly simple and reasonably priced option. SVLS can also look at couriers used within the larger library systems in the group to see if it would be feasible to extend those local services to the other SVLS libraries.

Final Thoughts

Although there are no technical issues that would stop all 7 libraries from implementing a shared ILS, there are some practical issues which may influence the ability for a solution to work for everyone. There were two major issues identified by the consultant:

- Santa Clara County is currently involved in an ILS migration project and will be on an Horizon ILS within the next several months. Since this decision was made due to issues found after migrating to Sierra, it would not make sense for this library to move to a unified platform, if the selected platform is Sierra.
- Los Gatos is currently using Koha which is an open-source ILS option. The costs for running Koha are very reasonable and fit into the library budget. If a proprietary system was selected as the shared ILS, costs for Los Gatos would need to be examined closely to ensure that they do not become prohibitive for this library in joining the group. Also, since Los Gatos does not currently offer ILL services, the staff resources as well as any additional costs for delivery services may not be feasible.

A shared Sierra system, for 5 or 6 of the SVLS libraries may be the path of least resistance. Moving from a single library implementation of Sierra to a shared Sierra system would require minimal staff training and would also not affect workflows significantly. Although Sierra is not the easiest system to manage for a group, there is a great deal of staff expertise among the libraries with this system which aid the group not only in the migration but also in the ongoing support of the shared system.

Another option which was not investigated during this project is to join the already existing PLS implementation of a shared Sierra system. The technical infrastructure is already in place and the addition of the SVLS libraries should only require minimal additions in this area. SVLS staff would join existing committees and add their expertise to the groups instead of having to create new groups among the SVLS libraries. PLS has IT staff as well as other experts available to help with implementation and training. The system would offer a larger set of materials to SVLS patrons and spread patron requests out to a larger group of libraries. This option may provide the SVLS libraries with a very cost efficient and fairly simple path for increasing resource sharing activities without the need to duplicate work already done in the region.

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	Los Gatos	Mountain View	Palo Alto	San Jose	SC City	SC County	Sunnyvale
System/Discovery	Koha/PAC	Sierra/Encore/W ebPAC	Sierra/Encore/W ebPAC	Sierra/Encore	Sierra/Encore	Sierra/BiblioCom mons to be Horizon/BiblioCo mmons	Sierra/Encore

	Los Gatos	Mountain View	Palo Alto	San Jose	SC City	SC County	Sunnyvale
Patrons/Circulation Rules							
1. How many different formats do you have for patron barcodes? What number ranges are in use? What formats are in use?	1 format: 14 digits with check digit. Starts with 23518	1 format: 10 digits, no check digit, begins with 200	1 format, Codabar 14 digit, begins with 21185	1 format, 14 digit with check digit—21197...	1 format, 25119 starts with and 14 digit with check digit	1 format, 14 digit with check digit -- 23305XXX	1 format 2145400, 14 digits
2. How many patron types do you use? Can you provide a list?	9	38 (inclnding LINK+ types)	32 (only 7 for them, the rest for LINK+)	27 and those for LINK+	Less than 15 active types	21	5
3. Do you use any special fields (stat fields) in your patron records? Can you provide a print out of a patron record?	Jurisdiction (Los Gatos vs. Other)	Use an ID field for CA Driver's License and other numbers	Use PCODE3 for age/geographic information (275 choices)	One for geographic/resid ency	Pcode 3 – geographical Pcode 1 – notify Pcode 2 – internet only	Pcode3 for residency	PCODE3 = home library (san jose), PCODE2 = Yes/no Newsletter; PCODE1 = Male/female; have the alias (staff side, doesn't display to public)
4. Do you have CA Driver's License information in your patron records? Can you search for patrons using this number?	No	Yes	Yes	Yes	Yes	No	Yes, some old patron. Yes, searchable. We no longer record that info

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	Los Gatos	Mountain View	Palo Alto	San Jose	SC City	SC County	Sunnyvale
5. Do some of your patron records have two barcodes? If so, what fields are used for the two barcodes?	No	Yes, they have a field for 2nd barcode that is searchable (alias)	Yes, but only for unusual cases (mostly staff)	Yes, one for check out and one for computer usage. (same barcode number)	Yes, only for those that are lost cards	No	No
6. How many loan rules do you have in place? Are they based on location codes and media types and patron types? If not, what are they based upon? Can you provide a list?	List provided. Based on Item and Patron Types	About 46 in the list but many not used. Based on all 3: location, item and patron type.	Only 19 rules, most policies based on patron and item types	23 for SJPL; most policies based on patron and item types	62	59 rules based on itype and patron, location not really used for rules	policies based on patron, item and location
7. What notices do you send to your patrons (courtesy or pre-due notice, hold notice, # of overdue notices and bills)?	Hold Notices Advanced Due Day Item Due 1st & 2nd Overdue Billing Checkout & Return Item	Hold Notice Courtesy/Advanced Due Hold Cancel (with fee) 1st & Second Overdue Billing Checkout	Courtesy, Hold, 1 Overdue and Bill	Courtesy, Hold, 1 Overdue and Bill	Courtesy, Hold, 3 Overdue and Bill	Courtesy, Hold, 2 Overdues and Bill	Courtesy, Hold notice, hold cancel, 1 Overdue and Bill (mailed)
8. What formats of notices do you use (paper, telephone, text messages)?	Email Print (Hold notices only)	Email Phone Paper Text coming soon	Print Email SMS	Email Phone Mail	Email Phone Print	Email Phone Print	Email Phone Text Mail
9. Do you have telephone renewal available to your patrons?	No	Yes, notification and renewal	No	Yes	No	Yes, TM3	Yes, Notification
10. Do you have floating collections?	No	No	Yes (specific materials)	Yes (very specific materials)	No	No	No

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	Los Gatos	Mountain View	Palo Alto	San Jose	SC City	SC County	Sunnyvale
Bibliographic and Item Records							
1. Where do you get your bibliographic records?	B&T and Midwest (952 tag used) Other Libraries (Z39)	EDI for ordering, B&T and Midwest...also smaller on Ingram (brief), overlay with OCLC, starting to load records from Enki	For Shelf-ready: B&T, Midwest Tapes, Ingram For copy cataloging: OCLC Ebooks/eAudio: B&T and Overdrive, Hoopla, Enki, Total Boox, Ebsco, Safari eSerials: serials solutions	OCLC, acquisitions vendors, OverDrive	Vendor (shelf ready, B&T, Ingram about 15), overdrive, full from OCLC, enki, safari, hoopla	OCLC mainly with some brief records from acquisitions vendor, records for Overdrive come from OCLC	Brief record from iPage and OCLC
2. Are you a member of OCLC?	No	Yes	Yes	Yes	Yes	Yes	Yes
3. Do you do in-house authority control or send your records out to any authority vendors?	No	Yes, use Marcive	Just migrated but will be using Marcive for at least one cleanup	Yes, through OCLC	Use BackStage (quarterly)	Now using BackStage, will do own on Horizon	In-house
4. Do you add any special local fields to your bibliographic records?	No	945 for Marcive enki uses a 9xx	Series information in 440: 9xx tags for match point; 946 or 947 for items	Order 961; 956 internal note	9xx for BackStage	999 for Horizon number, 949 for items	949 for items

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5. What MARC tags are used for your call numbers?	099, 092	099 (starts with letter); 092 (starts with #)	090 (local, dewey)	092 – current, 099 -- past	092 non fiction, dewey and sanborn cutter, 099 fiction non dewey (some but not all)—some old records have an 090 with dewey call number	092 (all types, even fiction)	099, 092
6. Do you have item records? Do you have call numbers in your item records that are specific to the item?	Yes, including serial issues and electronic resources with items/barcodes	Icode1 = what format it is...adult, teen, childrens. No item records for ebooks.... Item specific call numbers most of the time but combo	Yes, specific to item	Yes, specific to item	Yes have items but call number only in item record if different from Bib	Yes, some are specific	Yes, item specific call numbers
7. How many different formats do you have for item barcodes? What formats are in use? What number ranges are in use?	1 format -- 14 digit with check digit...33518	1 format...10 digit (no check digit)....starts with 100	1 format, Codabar 14 digits....starts with 318500000000-3118502040000	1 format, 14 digits with check digit – 31197 to 81197	1 format –35119 – 14 digit with check digit	1 format, 33305...14 digit call number with check digits	1 format, 3145400xxxxxxx, 9145400xxxxxxx, 8145400xxxxxxx 14 digit with check digit.

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	Los Gatos	Mountain View	Palo Alto	San Jose	SC City	SC County	Sunnyvale
8. How many locations do you use? Can you provide a list?	2 branches (one digital), 57 locations now	Locations Served: Main, mobile, off-site, LIN+, Garage Return; about 82 under these	1379 locations now. First character is age, then location, type of collection – had to duplicate all for children’s library – all repeated for each branch	73+, first letter basic collection such as adult, language, juv then type such as media, computer)	150 plus those for LINK+	400 collection codes, 9 shelving locations	20+
9. How many media or format types do you use? Can you provide a list?	Based on Collection Codes (provided list)	Bib Level, use some standard and some local	20 material types	About 15 (ITYPE)	24	61 which include information on patron level (adult, juv)	15+

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	Los Gatos	Mountain View	Palo Alto	San Jose	SC City	SC County	Sunnyvale
Misc.							
1. Do you use the acquisitions module? Which vendors do you use the most? How does your order process work (EDI, emails, paper, etc.)?	No	Yes, use EDI and some direct orders with Amazon	Yes. B&T & Ingram thru EDI now. Midwest tapes will be set up via EDI	Yes, use many vendors small and large, EDI with B&T now	Yes. EDI – with B&T, Ingram, Midwest Tapes	Ingram and B&T, using EDI	Yes. Ingram (largest/EDI), Midwest (EDI), Baker and Taylor (standard order but not much now). Language vendors. Very little from AMAZON.
2. Do you use the serials module?	No	Yes. Check In on ILS and claims thru ILS or on vendor website	Yes. Just switched to Cox this year and will load invoices. Check-in done centrally.	Yes, do check-in centrally and use for PAYMENTS too	Yes, central check-in and they all have items because they circ	Yes, central check in	Yes. Check in, claims for internal use only (really does claim on EBSCO)
3. Do you allow patrons to pay by credit card? Through PAC? At Circ Desk? Other methods?	At desk, goes through City	Yes, PAC and Circ Desk	Yes, via catalog (currently implementing) and at POS machines at circ desk (Comprise). PayPal.	Yes, through PAC but not at circ desk. will have cash/credit card with new RFID stations	Yes, PAC and at Circ Desk (use Square)	Yes, self-service kiosk and online	Yes, only online, Webpac, and Self Check. No credit cards at Circ Desk. Through PayPal

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4. Do you use RFID? If so, what company provides the tags? What format(s) do the tags use?	Yes, 3M tags purchased through CALIFA	Yes. Now using MK, pads, check outs check ins, sorting. Tags are 2x2 (media) and 2x3 (books), bay scan. Imprint provides tags for DVDs. "Danish model"	Yes, Bibliotheca, Danish model. All of the collection	Now 3 completed branches (tagging), Decision One. Large tag for books, smaller for media....scheduled to be done....by end of August then installing equipment	Yes, all is RFID. 3M/Bibliotheca, with pre-programmed tags	Yes, all material, 3M tags	Yes. Biblotecha...in the past thru CALIFA
5. Do you use any automated material handling units? If so, where and from what company?	6 bin system, 2 induction stations for book return	11 bin sorter from MK	Yes, Mitchell Park and Rinconada Libraries (book returns); PV Supa's AMH from Envisionware (reseller)	Yes. Book returns (not all branches but most of them, going forward all will have one). PV Supa...Lyngso (older ones)	2 sorters, (15-20 bins) and (5 bin). TechLogic.	Each branch has return AMS. PV-Supa...sorting at central process	Yes. Bibliotheca. 2 out, 2 in...21 bin total

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Discovery Layer/Public Access							
1. What discovery layer are you using now?	Koha OPAC	Use Encore, but also have Classic for power users	Encore and WebPAC	Encore	Encore and WebPAC	BiblioCommons and Boopsie for mobile	Encore
2. Do you like the current discovery layer?	Yes	It is okay	Since they moved so recently, staff still getting used to new PAC.	Okay	It is okay	Yes	Yes
3. Are you interested in looking at third-party discovery layers or do you want to use one that is from the ILS vendor?	Not in plans now	Possible move to Bibliocommons in the future but no plans now	Not looking right now but some staff are interested in other options.	Yes	May be interested in BiblioCommons	Not unless it could replace all functionality in BiblioCommons	Not looking now
4. Do you integrate searching for articles and other databases in your discovery layer?	They can but do not do this now	Yes, using separate tab (mostly EBSCO)	Yes, they use the EDS version of Encore	Yes, but not interfiled	Use Encore Duet which has tab for articles	Have Serials Solutions and would not mind combining materials	Yes, on different tab
5. Where do you get your book jackets for display in the public interface?	Amazon	Content Café	Content Café	Content Café	Syndetics (through Innovative)	Syndetics	Content Café
6. Do you have NovelList integrated into your current discovery layer?	Yes NovelList Select	Yes, NovelList Select and Plus	No (have K-8) not Plus or Select	Yes, Select	No	Yes, NovelList Select	Yes, NovelList Select and Plus

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Third Party and External Interfaces							
1. Do you use EZ Proxy? If not, how do you authenticate users for online resources?	Yes	No, mostly use barcode beginning numbers only	Yes, hosted version.	No, using WAM and PatronAPI	No, use WAM	Yes, run in-house	No. Authentication is done by our City IT Department. Uses PIN
2. Do you have a PC Time Management system in place? If so, what do you use?	EnvisionWare PC Reservation	Yes, Librarica Cassia	Yes, Comprise's SAM system	Windows NTP	Yes, Cybrarian	Comprise	iTeam from Pinnacle
3. Do you have a print management system in place? If so, what do you use?	EnvisionWare LPT1 and wireless printing	Yes, Cassia	Yes, Comprise's SAM system	P1nnacle	Yes, Pinnacle	Comprise	iTeam from Pinnacle
4. What ebook/eaudio providers do you use?	Overdrive, 1 click digital, enki (with bibs), freedding, tumble books, books 24x7, EBSCO online book	Overdrive, Axis 360, enki, some EBSCO, Sesame Street ebooks, tumble books, Gale virtual reference (DK ebooks).	Overdrive (integrated checkout), Axis360 (working on integration), Enki, Hoopla, Zinio (integration through serials solutions records), Gale, Indieflix, Learning Express, Safari	1 drive, access 360, one click digital, enki, EBSCO, Safari, Books24x7, Gale, Totalboox, Overdrive hoopla, freegal	Overdrive, Hoopla, One click Digital, indie flix, freegle, tumble, Lynda.com	Overdrive, 3M, One Click, freegal, Safari, enki...Learning Express	OverDrive (integrated) , Flipster , Zinio , 3M Cloud Library (integrated), Hoopla , InstantFlix , Total BooX , Gale, Virtual Reference Library, Enki Library, EBSCOhost eBook Collection, OneClickdigital, Safari Tech Books Online, Books 24x7.
5. Do you use self-check stations? If so, from which company?	Yes, 3M	Yes, MK	Yes, 3M (now Bibliotheca)	Yes, 3M (Bibliotheca) in all branches	Yes, 3M	Yes, Bibliotheca	Yes. Bibliotheca

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6. Do you use any vending-type machines?	EnvisionWare for copy/print	No	No	No	Yes, laptop vending soon	No—maybe laptop dispensing and book vending/holds pickup in future	Yes. One at local Neighborhood Center. PIKInc. Check out for paper

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	Los Gatos	Mountain View	Palo Alto	San Jose	SC City	SC County	Sunnyvale
Resource Sharing							
1. Do you share materials with other libraries within SVLS or externally?	No	LINK+	LINK+	LINK+	LINK+ and OCLC Resource Sharing	Yes, via OCLC	LINK+
2. If yes to #1, how do patrons place requests?		Patrons online or staff enter	Record in their catalog indicates "LINK+" item and patrons can request	Link in OPAC	LINK+ notation in catalog	Forms on the website (emails staff), staff enters in OCLC	LINK in catalog
3. If yes to #1, how do you send/receive materials?		Tri Cor	Tricor delivers to all LINK+ libraries 5x week – going to Rinconada (drop off at any library)	Tri-cor (to King/Central)	LINK+ courier...comes to Main...own courier for branches (same company, separate contract), mail for OCLC	Mailed to other libraries	LINK+ courier, once a day
4. Do you have a courier system you use (for branches or to other libraries)?	PLP Courier picks up twice a week (returning items to home libraries)	No	Yes, we use our internal City delivery services – M-F (to all, even if closed, comes twice a day)	Yes, own staff and vehicles	Yes, same company (Tri-Cor)	Own service for branches	No
5. How much material is shared within the SVLS group? Do you have any statistics on this type of usage?	None	LINK+	LINK+ For last 2 months-- borrowing 575 items per month and lending 1,750	LINK+	LINK+	Varies by month but majority for outside of CA libraries	

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	Los Gatos	Mountain View	Palo Alto	San Jose	SC City	SC County	Sunnyvale
Staff Resources							
1. Where is your system hosted? Local or vendor hosted?	Hosted by ByWater	Onsite, turnkey	Hosted by Innovative	Self-hosted	Hosted by Innovative	Self-hosted	Hosted by Innovative
2. How many staff do you have at the library total?	32 people	99 people	87	450	About 75, 43 FTE...	265 total...300 plus for desk support 265 "quartered" employees	About 75
3. How many people at your library have system administrator or other ILS responsibilities? How are the responsibilities divided?	All can call ByWater. One main contact at library (Carol usually, Robert during maternity leave)	2 people but one with majority of responsibility	1.5 FTE. 1 system administrator (some BA). .5 comes from time on database maintenance and management of discovery tools. 2-3 librarians share those assignments.	Duties divided with University; each library has 1 sys admin	2 people, one in tech services and one more sys admin	4-7 people in IT group, plus 4-5 more people	All tech services, 1 or 2 for system admin
4. How much time per week does library staff spend maintaining and administering the ILS?	2-3 hours per week	30 hours	If this includes maintenance in relation to cataloguing and web services, total 60. Administering the ILS alone is 30 hours.	IT – about 40 hours (bkups, storage, tickets, off site management) Systems support – 50 -60 average hours...	2-3 hours per week	IT – 1 full time person; others it is issue-driven	Upgrades, adding databases, etc. She is new in position so spending 1 day a week at least

SVLS Unified ILS Study Results

May/June 2016


	Los Gatos	Mountain View	Palo Alto	San Jose	SC City	SC County	Sunnyvale
Sizing Information							
1. How many bibliographic records do you have in your ILS?	109,556	318,570	320,000	431,127	350,000	516,843	324,739
2. How many item records do you have in your ILS?	127,534	324,828	285,000	2,182,765	470,000 (no item records for electronic resources)	1,927,355	318,036
3. How many patron records do you have in your ILS?	29,793	99,825	55,000	511,904 (will be doing annual purge)	111,000 only about 70,000 that are active	269,170	120,417
4. How many staff members at the library login to the ILS?	9 specific logins and then shared Circ login. 3, including Director, has SysAdmin access.	60 logins (individual and group logins used)	65 total. use generic logons that are shared for front desk (public service desk) and then individual logons for every staff person with the exception of pages	350, some individual and some group	60-65 logins, Circ shares logins	both generic circ and reference and individuals...at least 300-400	About 50, shared circ but many have own login as well. Every employee has own login.




Cloud Features that help you connect to your community and drive circulation

Cloudlink


Increase circulation **AND** collaborate by sharing your Cloud content with other libraries.



**West
Library**




**Your
Library**



**East
Library**

Red double-headed arrows connect 'West Library' to 'Your Library' and 'Your Library' to 'East Library'.

- Prioritize your collection
- Your patrons get your content first
- More content for your patrons
- Shorter holds lists
- Share your content with partnering libraries
- Separated reporting
- Control of patron facing shelves
- Ownership Of Titles


 the best of both worlds

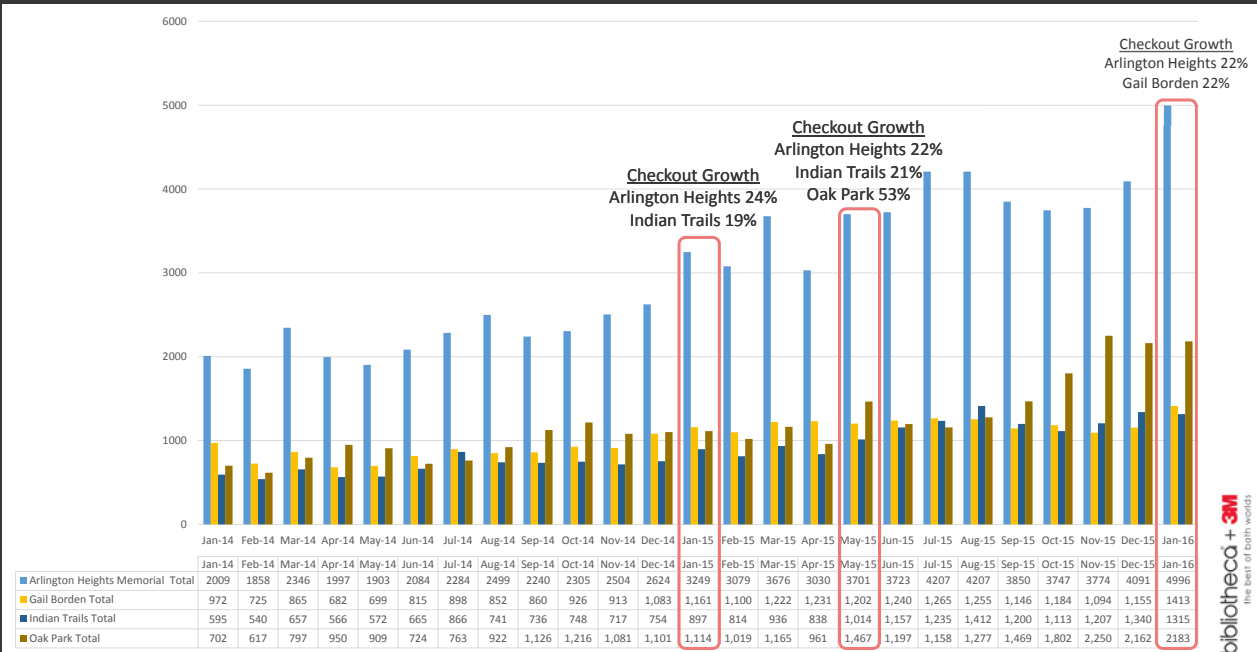
Notes from slide 2

- Our Cloudlink feature is a unique way Cloud Library can help you enhance your collection. In the collaborative spirit of consortiums and interlibrary loan, we think our Cloudlink feature is one of the most exciting things about Cloud Library –
- Cloudlink is linking your cloud library with other libraries and sharing your collections. Cloudlinking will enable you to get more content for your patrons,
- Shorter holds list for all, more use of your content, and priority on your patrons for your content first.
- We've seen libraries of all sizes use Cloudlink—The Metropolitan Library Service in Minneapolis/St. Paul which is 8 systems and over 100 libraries to 3 small libraries in southeast Wisconsin benefit from this feature.

Timeline of CloudLinks

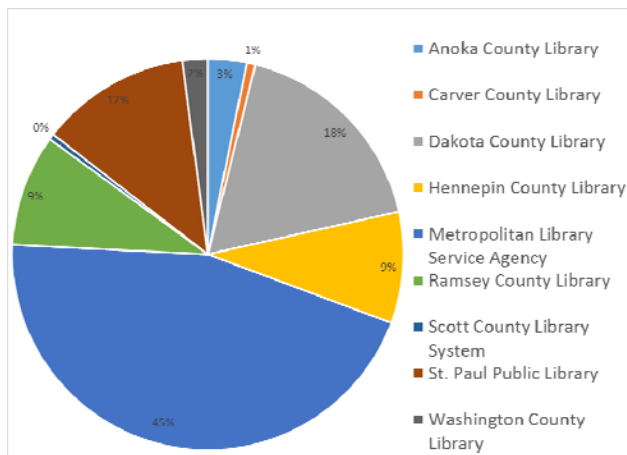


CloudLinking Affect on Circulation



MELSA Cloud Link Program # of titles as of 2/16/2015

3M Cloud Library



8 existing private clouds = 50,140 titles

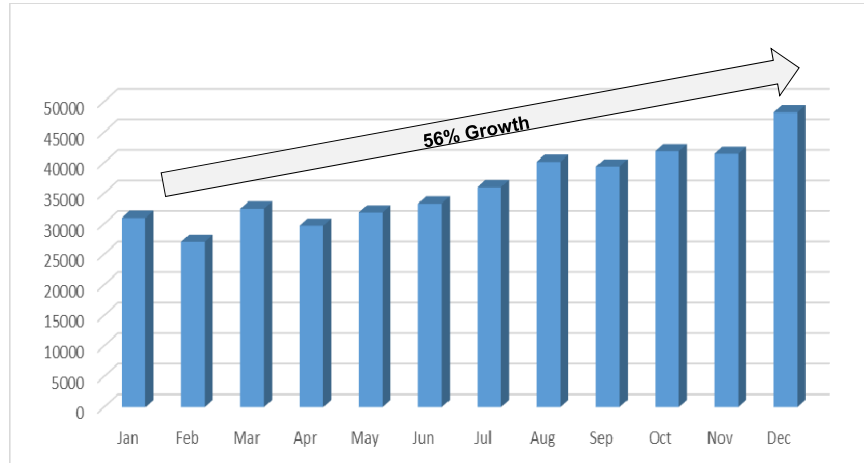
- Dakota = 16,059
- Ramsey = 8,441
- St. Paul = 11,321
- Washington = 1,916
- Anoka = 2923
- Carver = 650
- Scott = 434
- Hennepin = 8,396

MELSA consortium cloud = 41,177 titles

Total Collection = 91,317 titles

Checkouts Across All Systems

3M Cloud Library



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Active Patron Growth Across All Systems

3M Cloud Library



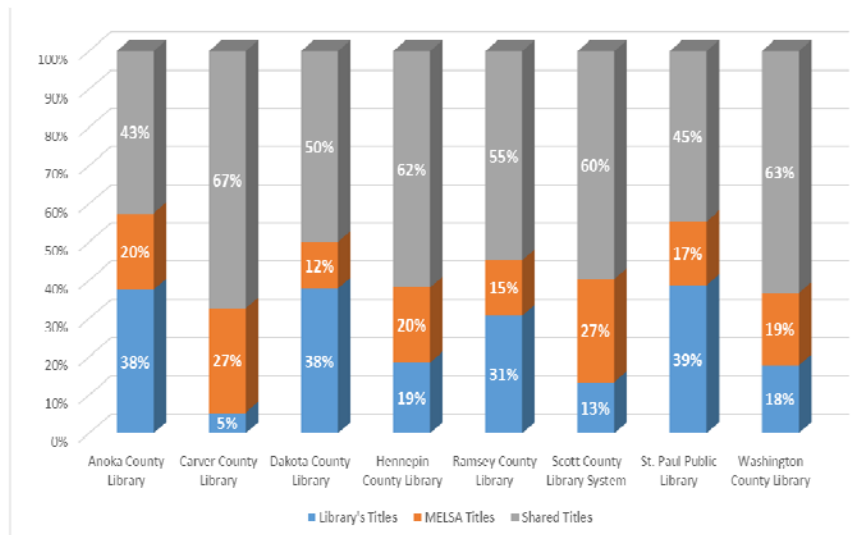
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Patron Activity

3M Cloud Library

Where Your Patrons Are Checking Titles



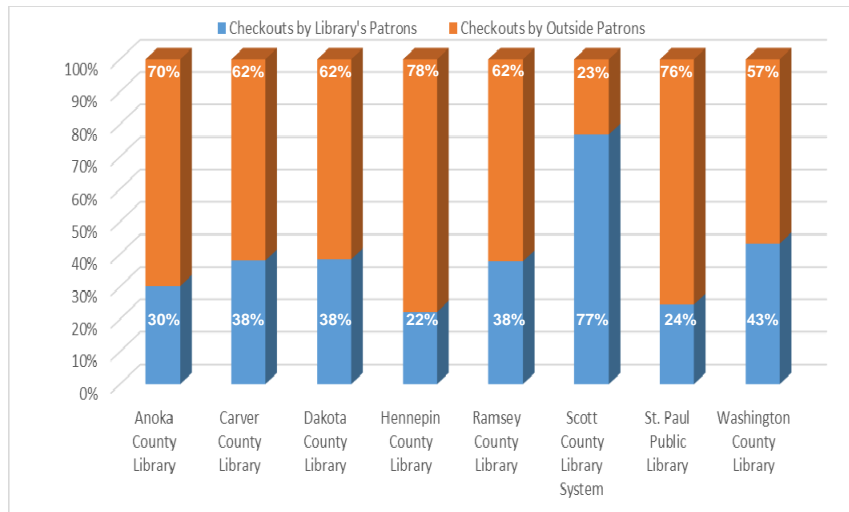
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Content Activity

3M Cloud Library

Who is Checking Out Your Titles



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Cloud Features that help you connect to your community and drive circulation

Content Transfer

Ready to bring your content over to Cloud?

- Straightforward, easy process with expert help from our team
- We handle the publisher contact
- There is no "wrong" content
- Even content with expiration models can now be transferred.
- You don't need any permission from other vendors, we handle the publisher contact and there is no "wrong" content. In most cases, we can transfer around 90% of the value of your collection.

