Project Proposal

Working Title of Project	ILS Migration
Project Sponsors	David Hardgrove, Interim Dean of the HCCC Library

Proposal Type	❑ Idea in progress
Project Type	❑ Ongoing Project

Primary Contact	Name	John DeLooper
	Phone	201-360-4374
	Email	jdelooper@hccc.edu
Backup Contact	Name	Mei Xie
	Phone	201-360-_____
	Email	mxie@hccc.edu

Executive Summary

Last year, the HCCC Library determined that our current ILS was no longer meeting the College's needs. In addition, the product was costlier than the college could bear. With that in mind, the Library investigated various other ILSes and vendors, and decided to migrate to Koha with a support vendor.

Statement of Need

For nearly 10 years, HCCC has used its current ILS. However, this is no longer a good option. Common features like the back button in the OPAC do not work, and the vendor has no plans to upgrade the software. However, they do offer to sell a new ILS for twice the already steep price.

Realizing that the College could not afford this upgrade option, and that we were under-utilizing features of the current ILS, and that faculty and staff found the ILS cumbersome, and realizing that the current ILS was not adequately serving our students, we decided to explore options and switch to a new ILS. This took on especial importance since our contract with our current vendor ends on 6/30/2017.

Project Goals

- Ensure all staff are trained in the ILS by _____.
- Conduct training
- Ensure all staff have accounts available
- Roll out new ILS on time
- Roll out new ILS with minimum confusion from students, faculty, and staff
- Test features like Reserves module
- Test feature for doing holds

Constraints

- Budget: This project has no budget
- Making sure all staff are trained in a timely basis
- Time – ILS must be implemented during a college break
- Staff time – the Spring semester is always a busy time of year, and finding enough time to train staff is always difficult.

Requirements

During the Project
- Logistics
    - Training
    - Adapting to new processes/workflows
- Human Resources
    - Additional Staffing at service desks during first few days of rollout
- Technical/Technology Requirements
    - Our current PCs are adequate, however, we need to contact the State Library to setup hosting
- Marketing Campaign to drive awareness
    - Blog posts, portal announcements

After the Project
- Recap on how it turned out
- Discuss opportunities to continue to improve

Time vs. Relevancy

Time:
- Project began ___
- Spring semester is final push
- Training from ____ from vendor
- Training for staff from ____ to ___

Relevancy
- Contract is for 3 years

Impact: Costs & Risks

Opportunities:
- Position the library as a learning/marketing venue for local/community experts (chefs/expert hobbyists etc.)

Effect on business processes
- Event administration workflow
    - Event marketing + Event registration
    - Skills station setup
- Course administration workflow
    - Course administration
    - Trainer/Staff management

Staffing
- Additional staff to facilitate setup/teardown of events
- Hiring trainers to conduct pro-bono and paid events

Effect on client base
- Increase interest in events
- Manage expectations of stakeholders in Library board
- Manage potential negative impact on patrons

Budget
- Utility costs *($█)*
- Marketing costs *($█)*
- Trainer costs *($█)*
- Skills specific requirements (equipment etc.) *($█)*

Competitive Advantage
- New facilities at library compared to other venues

Impact: Benefits & Opportunities

Benefits: modern, functional ILS
Web based clients – won't require ITS to install ILS on all systems
Easier web interface should reduce confusion
Chance ot test holds
Dedicated reserves module
Z39.50 integration to simplify copy cataloging
Significantly lower cost
Open source allows us to modify system
Open source also gives us more opportunities to export our data, should we ever decide to switch ILSes

Alternative Impact

No ILS ➔ nobody can borrow books

Project Fit

Alignment:
Interaction: Patrons have more reasons/opportunities to spend time at the library
Public Relations: Enhance reputation of library in the community
Revenues: Secondary revenue streams from courses

Evaluation and Measurement

- Does our circulation go up?
- Do staff make less errors
- Do students report satisfaction with using our ILS?

Potential Solution

- Surveys to go out in mid-January to identify interest areas
- Identify and Approach skills providers in early-February
- Start marketing campaign in mid-February
- First Discovery Day to be conducted in early-March

Alternative Solutions

- We could host Koha ourselves.
    - ITS does not like us to host our own system
    - We did try this though – there is a test server in our Library.
- This would also leave us without outside support.

- We could switch to another ILS
- Already have sunk a lot of resources into this

Contingency Plan

- Risk: Migration Fails
- Continue to use our system until it is fixed, and transition ot the new ILS at a later date (before 6/30)
- Host either Koha or Evergreen on one of our own machines
- Risk: Patron data does not get properly loaded
- Have library staff manually register patrons.

Additional Information

- Schedule
- Vendor Selected: DONE
- Vendor approved by Board of Trustees: DONE
- Payment for
- Contract Signed by College – DONE
- Cataloging Data meeting
- Patron Data meeting
- College training
- 3/18 to 3/20 – Vendor does final migration
- future plans:
- incorporate with planned Smart Card System
- LDAP integration so students can log into Library account with same user name and password