

Final Report: Integrated Library System Selection Committee

July 17, 2014

Introduction

The Westchester Library System's (WLS) contract with SirsiDynix, the provider of our integrated library system (ILS) expires in April, 2015. A joint WLS-PLDA (Public Library Directors Association) committee was created in January, 2014 to steer the process of selecting the system's next ILS. The committee consisted of Brian Kenney (Chair, White Plains), Wilson Arana (WLS), Rob Caluori (WLS), Angela Groth (Ardsley), Pat Miller (Somers), Norm Jacknis (WLS Board), and Terry Kirchner (WLS). Tom Geoffino (New Rochelle) participated in some of the initial meetings.

Timeline

RFP posted:	March 21, 2014
Vendor questions due:	April 4, 2014
Responses posted:	April 14, 2014
Proposals due	April 25, 2014
Follow-up demos	May 2014
PLDA approval	July 17, 2014
Presentation to WLS Board	July 29, 2014

Methodology

WLS sought RFPs from vendors that provide library systems to public library consortia. The RFP was created by the committee, with input from PLDA. Key concerns from members were that we improve the discovery experience for library patrons, especially producing search results that had greater relevancy. There was also concern that the system to continue to support interlibrary loan/resource sharing among member libraries, something that the SirsiDynix system does well.

We received a number of questions from the vendors regarding the RFP, and these were answered and posted online. Responses were received from six systems: CARL-X, Innovative Interfaces, LibLime/Koha, Polaris, VTLS, SirsiDynix, and Equinox, which provides development for the open source software Evergreen.

CARL-X, Polaris, SirsiDynix, and Innovative Interfaces each visited Westchester and provided two demos in different parts of the county prior to the RFP being written. A newsletter was sent to all staff, informing them of the process and timeline and inviting them to attend the pre-RFP demos. All participants were surveyed at the end of each demo and this information was used to identify and prioritize important components desired in the ILS.

In addition, members of the committee, as well as other librarians in the system, visited with vendors and reached out to other library consortia at the American Library Association Midwinter Meeting in January, the Public Library Association Conference in March, and the American Library Association Annual Conference in June.

A scoring matrix was developed, and in May the RFPs were rated. The two finalists returned to give lengthier presentations. The committee also conducted extensive interviews with other consortia using both systems.

The attached addendum (ILS Analysis) includes comparative financial data, staff opinion from the demonstrations, and a possible model for implementing Evergreen, the open source software.

Narrative

Little did we know when we began this process how tumultuous a time this would be in the world of library systems. While the number of library vendors has been contracting for some time, in the middle of our RFP process, Innovative Interfaces acquired both Polaris and VTLS.

The acquisition of Polaris was particularly upsetting. Some of us on the committee—as well as many Westchester librarians—liked Polaris. Its circulation functions seemed intuitive, it had terrific reporting, and the OPAC provided a highly user-friendly experience. In addition, for whatever reason, Polaris libraries offered the best and most relevant search results, and did so consistently. Had Polaris remained an independent company, the committee may well be making a different recommendation today.

If TLC/CARL was ever a serious contender, the heightened consolidations in the market made the notion of a going with a smaller—and possibly more vulnerable—vendor seem unwise. Who would want to migrate only to be acquired by another company? LibLime/Koha seemed best suited for standalone libraries and not for consortia environments.

This left us with Innovative Interfaces, which certainly made an aggressive play for our business. Pros for Innovative include the fact that it is used by many neighboring libraries—from NYPL to Mid-Hudson. While this would be an advantage for resource sharing, at the present we don't have any plans to initiate resource sharing with neighboring systems.

As we compared Innovative to Sirsi, there were advantages but also weaknesses. Although the sales team assured us it could be done, there was not a confident answer as to whether the holds fulfilment could match our current process. There were also significant limits on the fields available in the patron profile, which are used for generating various statistical reports. The OPAC and search results seemed stronger, but at the same time many libraries find it necessary to use a discovery tool, such as BiblioCommons or Aquabrowser, on top of the OPAC.

When we spoke with ILL customers, they sounded like...well....Sirsi customers. There are aspects of the software they felt worked well, but there were also sources of real frustration.

We also had concerns about becoming part of a company that was in the process of integrating not one but two other systems—as well as the many disgruntled customers of those systems. Would WLS get the attention it needs in such an environment?

Finally, Innovative is very expensive. In the end, we couldn't find a compelling reason to recommend migrating from one proprietary system to another, more expensive proprietary system that offered no clear-cut advantages.

Evergreen was the pleasant surprise in this whole process. Many who attended the demonstrations of Evergreen were surprised at how robust the system was and how well it would seem to meet our needs. This makes sense, since Evergreen was created to support public library consortia.

The bulk of the committee's time was spent in researching Evergreen, understanding how open source software (and communities) work, and researching Equinox, the major developer for Evergreen. We spoke with many of the major systems that use Evergreen, including representatives in Massachusetts, Indiana, and North Carolina.

There were two compelling reasons to go with Evergreen. One, we would control our own destiny. We wouldn't be vulnerable to a vendor, especially a vendor that might be acquired by a competitor. Two, instead of trying to convince a vendor to develop the functionalities we want, we could go ahead and hire a developer to do it for us—using the savings we would gain from selecting.

From speaking with open source library systems, we learned the following:

- Don't expect to save money with open source. Everything you save will be spent on development
- The highest functioning systems have their own in-house development staff. If we went with open source, WLS would likely need to add staff for project management and development
- While some parts of the system are well developed, others are not. There are few reports available, and the acquisitions module, being developed by King County Library System (WA), may be available later this year
- The Evergreen community is small, although growing. This means that WLS would likely be the lead on much new development (although we might be able to partner with other systems). This could be quite costly for us
- As one director described it, open source is still "like the wild, wild west." Lots of people (in other systems) may want to make changes, but it won't necessarily happen on your time frame
- Going with open source would require a major cultural shift on the part of WLS. We would "own" our own ILS; but PLDA would have to work together to develop and prioritize the changes we would want in the system. It would require a significant investment of time from the member libraries—in serving on various committees—over the first few years.

There was also concern about the OPAC. Of all the systems we visited, those using Evergreen consistently produced the worst search results, with different formats of the same title sometimes appearing over two and three screens. While there could be many causes for this, this consistency

across the country was troubling. We don't want to go backwards in what we offer our communities.

Recommendation

For these reasons, the committee recommends that we sign a four-year contract with SirsiDynix. However, this does not mean that we are embracing the status quo. The contract with Sirsi provides significant savings, and we recommend that these be used to improve the customer experience. We recommend that:

- We invest in “cleaning up” and improving our metadata to improve search
- We invest in a discovery layer—such as BiblioCommons or Ebsco’s Discovery Service—to enhance the user experience
- We add enriched content—from ChiliFresh or Novelist—to make the catalog more engaging

In addition, our contract with Sirsi should include:

- Training. There are aspects of the software we aren't using; we should treat this as a migration and provide a range of training opportunities. In addition, we would commit to extensive training for new features, such as the new version of Director's Station anticipated later this year.
- Require that a Sirsi representative meet with WLS and representatives from PLDA (presumably a continuation of the ILS Committee) on a quarterly basis and attend a PLDA meeting at least once a year, both to notify us of developments on their end and to listen to our concerns.

While the committee is recommending that we sign a four-year contract with Sirsi, we also acknowledge that open source software may well be in our future. We should continue to follow the Evergreen community, and the development of the Evergreen software. Because a move to open source would be a real game-changer for WLS and PLDA, it would be helpful if more of our colleagues could familiarize themselves with open source; perhaps a group that could come together to explore Evergreen. In addition, in the next couple of years WLS could set up a trial version of Evergreen on a separate server with which we could experiment. In four years, we should have acquired enough knowledge that we can determine whether Evergreen is the right match for us.