

Open Source Open Libraries Consortium and Related Stuff

Lori Bowen Ayre
lori.ayre@galecia.com
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You Choose

Basics	ILS v OSLS	Case Studies	Misc	Looking Forward
<u>Open Source Open Libraries</u>	<u>Costs</u>	<u>Salinas Public</u>	<u>FUD</u>	<u>Opportunities for Consortia</u>
<u>Libraries and Open Source Principles</u>	<u>Service Providers</u>	<u>Evergreen Indiana</u>	<u>Koha Background</u>	<u>Empowering Staff</u>
<u>Open Source Licenses</u>	<u>ILS Market</u>	<u>William Jessup University</u>	<u>Evergreen Background</u>	<u>Development</u>
<u>How development works</u>	<u>Sales</u>	<u>Santa Cruz</u>	<u>oss4pl</u>	<u>Libraries are in charge of their environment</u>

FUD

- We don't have resident IT expertise.
- The “cost to for IT probably would outweigh present ILS costs.
- I'm not good enough with code to be able to easily make changes necessary for open source to be useful & cost effective.

- Would need someone willing to carry the OS torch to City Hall.
- There is no one to hold accountable when things go wrong.

- Collection is too specialized and tiny.
- There is not yet a proven open source ILS product available for multi-library systems such as ours.
- I think the size complexity of our system would not be a good fit at this point for an open source ILS.



<http://www.esilibrary.com/>

- Support
 - Per incident or comprehensive 24/7/365
- Migration
 - Project Management
 - Data Translation
 - Training
- Hosting
- Custom Development





<http://liblime.com>

- Support
 - Web and phone-based support
- Migration
 - Installation
 - Data clean-up
 - Configuration
 - Training
- Hosting
- Custom Development





<http://bywatersolutions.com/>

- Support
 - 24/7 phone-based support
- Migration
 - Data clean-up
 - Installation
 - Configuration
 - Training
- Hosting
- Custom Development





<http://koha.ptfs.com>

- Support
 - Email and helpdesk support
 - Tiered support structure
- Migration
 - Data export
 - Retrospective conversion
 - Implementation
 - Configuration
- Hosting
- Custom Development



<http://www.alphagconsulting.com>

- Custom Development
- Migration (especially from SirsiDynix products)

Media Flex

<http://www.mediaflex.net>

- Not available to download locally without registering with Media Flex
- No *obvious* open source community
- Most users are hosted by Media Flex



[Back](#)

Successful Consortial Models

- PINES (Georgia)

<http://www.georgialibraries.org/public/pines.php>



- SITKA (BC)

<http://sitka.bclibraries.ca/>



- Michigan Library Consortium

<http://mlcnet.org/evergreen/>



- Northeast Kansas Library System (NEKLS)

<http://nexpresslibrary.org>



- NYS BOCES provides support services for NY state school libraries using OPALS

<http://www.boces.org>



IT Staffing for the 21st Century Library

- System Administrator
- Database Administrator
- Project Manager
- Business Analyst
- Web Developer
- Software Developer
- Help Desk
- Trainer



Read All About it!

More Services for Fraction of Cost!

Shared costs includes:

- full staff for supporting library system
- training staff
- development staff
- data center
- support



$$\frac{\$950,000}{10 \text{ members}} = \$95,000$$

[Back](#)

Collaboration California Style

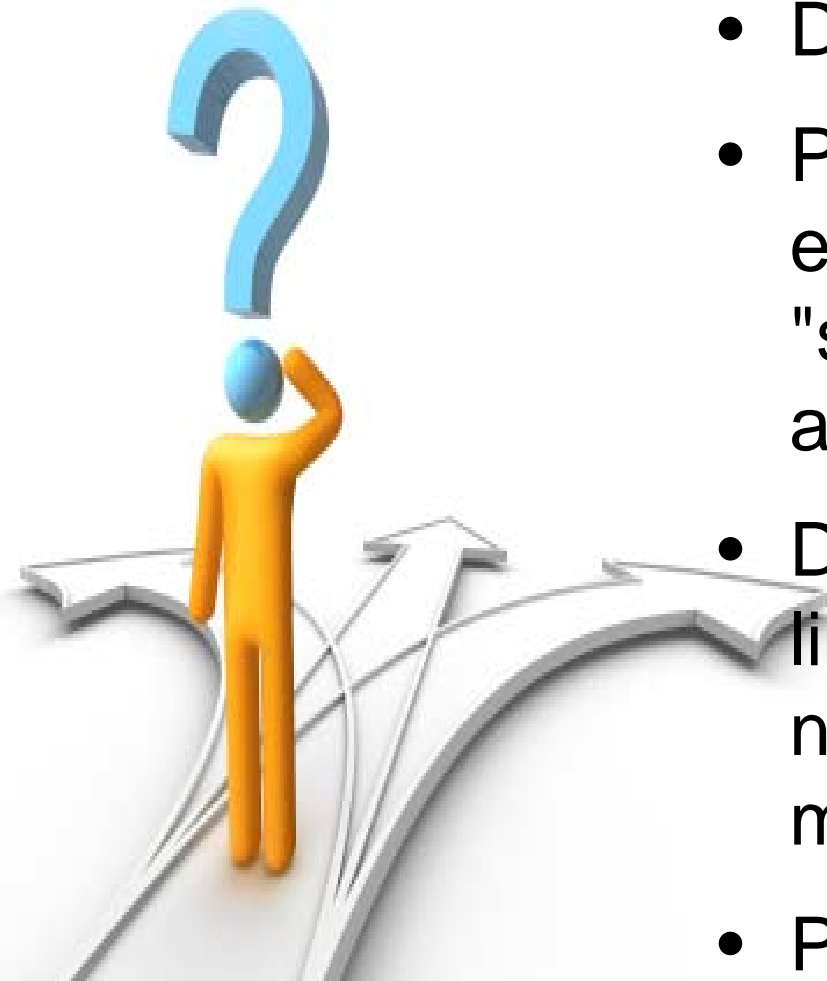


Open Source Open Libraries

- Two-year project designed to move California libraries forward in awareness and adoption of Open Source Library Systems.
- Founding library members: Pacific Library Partnership, Southern California Library Cooperative, North Net
- Partners: Califa, Liblime, Equinox
- More info: contact Linda Crowe, Executive Director (lcrowe@califa.org)

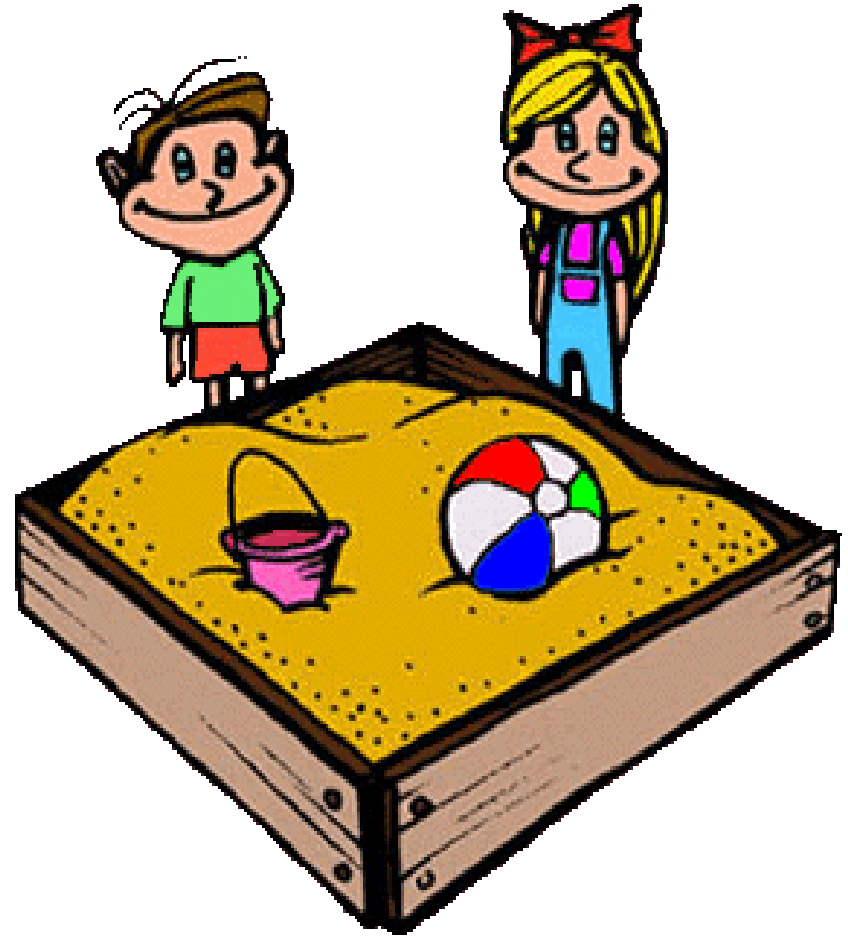
Year One Activities

- Deliver training
- Provide a demonstration environment (aka "sandbox") for Evergreen and Koha
- Develop tools to help libraries analyze their needs and plan for migration
- Provide technical support



Get in the sandbox and play....

- Koha sandbox is up and running
- Evergreen <experiencing some technical difficulties>
- Access via <http://opensource.califa.org>
- Stand by for more info on using the sandbox and for some guided tours of Koha and Evergreen!



Year Two Activities

- Provide support for libraries migrating to Open Source
- Work on resource-sharing and delivery of materials statewide
- Other tasks as assigned....





History

- Developed by Katipo Communications (New Zealand)
- Went live in 2000
- Designed for a single library

Installed Base

- Over 1000 libraries internationally
- first US library came online in 2005 (Nelsonville Public)

Primary market

- Smaller, international, school, special, and public libraries
- Howard County first big public library in U.S.

Two user groups

- KUDOS (U.S.)
- Kohala (France)

Developers

- distributed
- 80 contributors
- elected development team for each release

[Back](#)



History

- Developed by Georgia Public Library Service for PINES
- Went live in 2007
- Designed for consortia

Installed base:

- 102 libraries (94 public)
- 8 of those libraries are not part of consortia

Primary market

- U.S. public libraries

User

Groups

- None

Development

- Primarily Equinox Software, Inc.

[Back](#)

Open Source Software Licenses



GNU GPL

- grants recipients rights to modify and redistribute the software
- derived works must be available under the same license



BSD

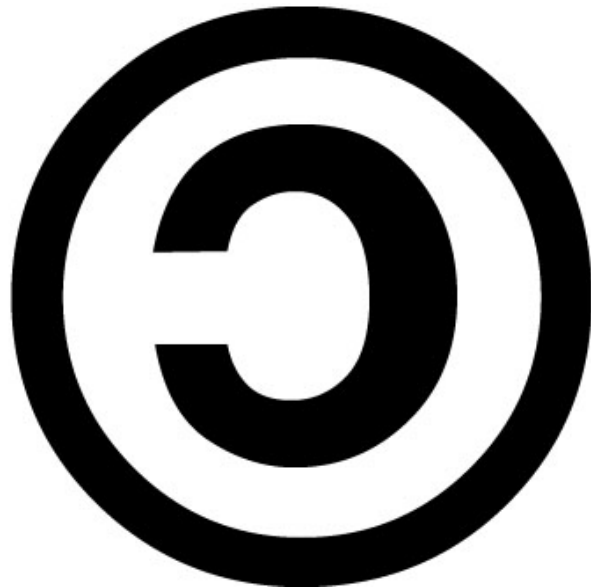
- grants recipients rights to modify and redistribute the software
- derived works must acknowledge the original authors



Released under GNU GPL
License



Copyleft ensures all of our work
remains free for all



[back](#)

William Jessup University

1. Something had to change
2. Looked over options
3. Looked for OS options first....
4. Library Director, IT Staff and other stakeholders agree to take the plunge
5. Went solo (no support) and have been up since 2008.

Example

Salinas Public Library

- Library short on money and staff
- Koha + Liblime provided the alternative they needed
- Some limitations: No acquisitions – no telecirc – no floating collections
- Biggest challenge: staff acceptance
- Customers love it

Example

[Back](#)

Evergreen Indiana

- State Library coordinates effort and pursues LSTA funding
- Equinox helps with migration strategy
- Hussey-Mayfield Public Library agrees to go first
- Soon have a group of 20 pilot libraries that form Executive Committee to develop policies and procedures
- Currently 26 libraries live on Evergreen Indiana (3.5 million circs) – more want in

Example

Santa Cruz Public

- Strong commitment to OS in other areas
- Evaluate options and choose Koha
- Contract with Liblime even though some key ingredients missing
- No funding available for development of “missing ingredients”
- Standing by.....

Example



imagine
john
lennon

Imagine if
people
working in
libraries
actually felt
their ideas
about how
to do
things
made a
difference?

With Open Source software, you
decide what gets built...



1-17-96

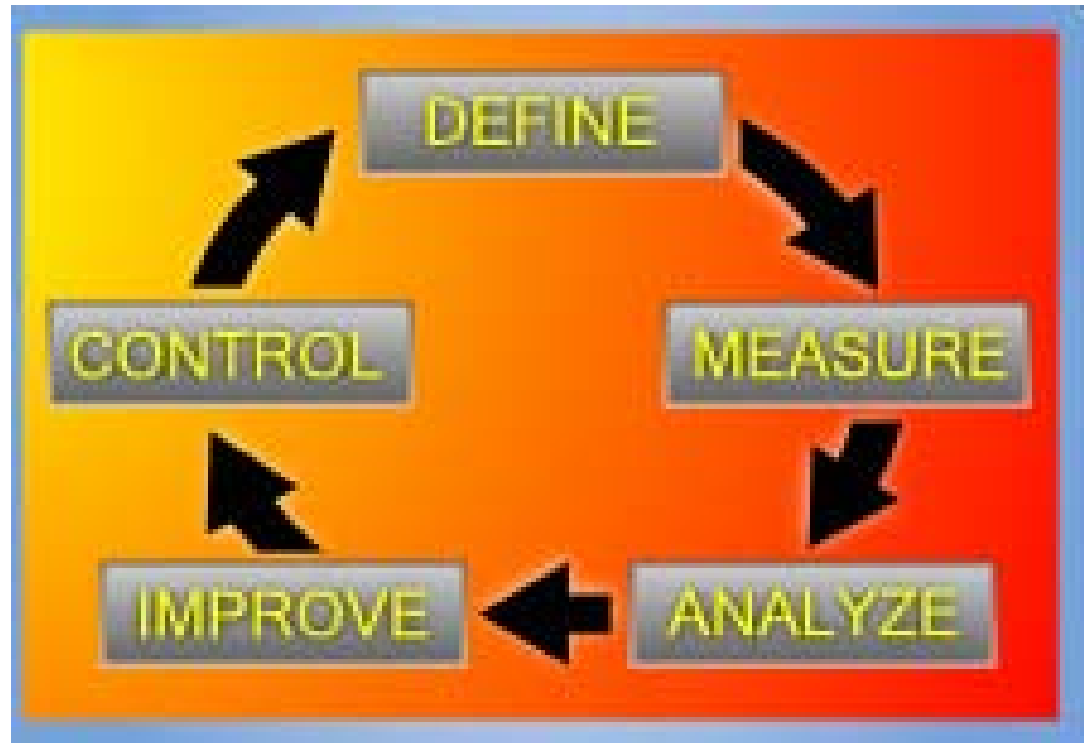
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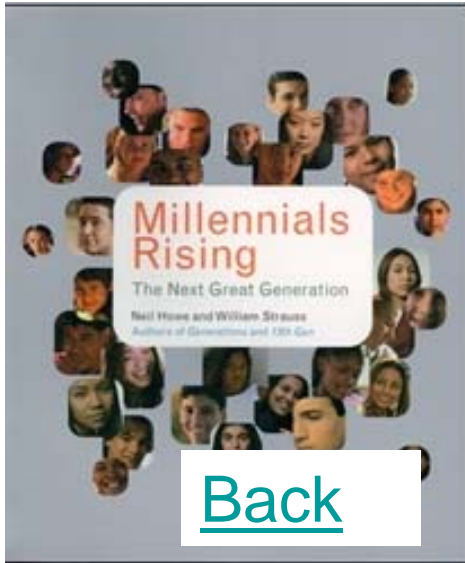
You decide how it works.

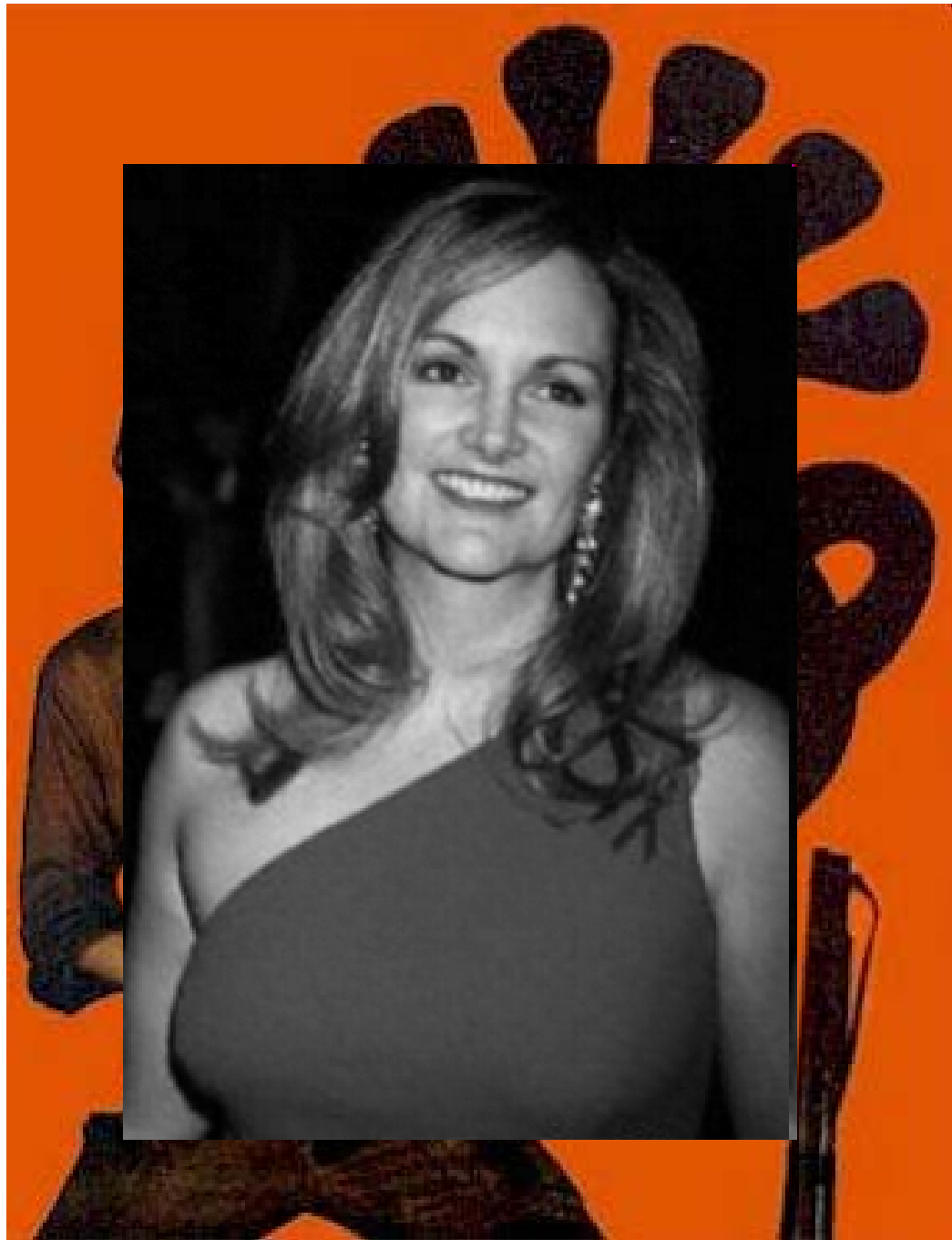


You decide *how* you work.



You have to tools to meet your community's needs





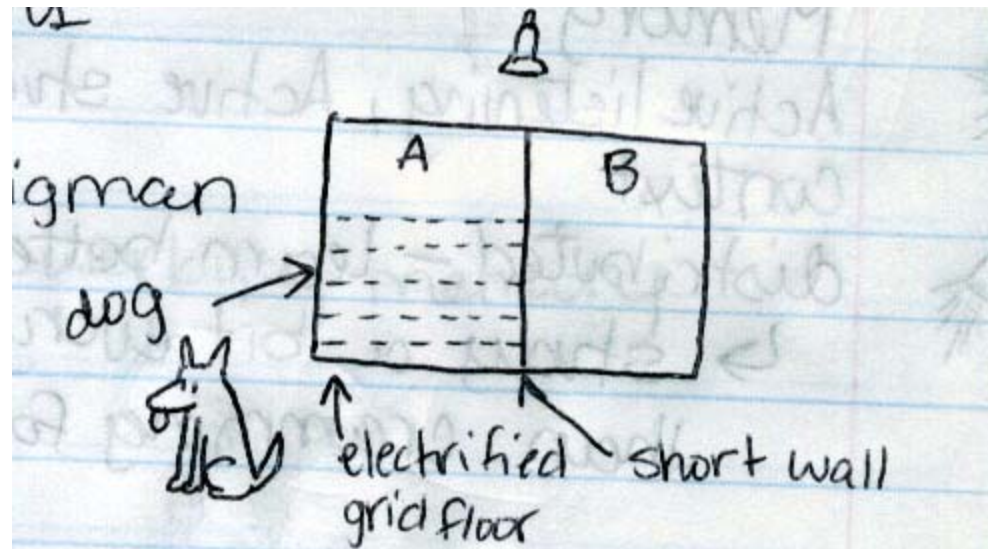
[Back](#)

Not an optimal working environment...



[Back](#)

Learned Helplessness



Learned helplessness is a psychological condition in which a human being or an animal has learned to act or behave helpless in a particular situation, even when it has the power to change its unpleasant or even harmful circumstance.



Cost Comparison

How much does your ILS cost?



Cost Comparison: Licensing

OSLS: No software maintenance costs, software updates are free to download when you choose

OSLS	
2009	n/a
2010	n/a
2011	n/a
2012	n/a
2013	n/a

Proprietary ILS: Vendors charge annually to keep the software up-to-date

ILS	
2009	\$45,000
2010	\$47,500
2011	\$50,000
2012	\$53,000
2013	\$55,000

Software Maintenance

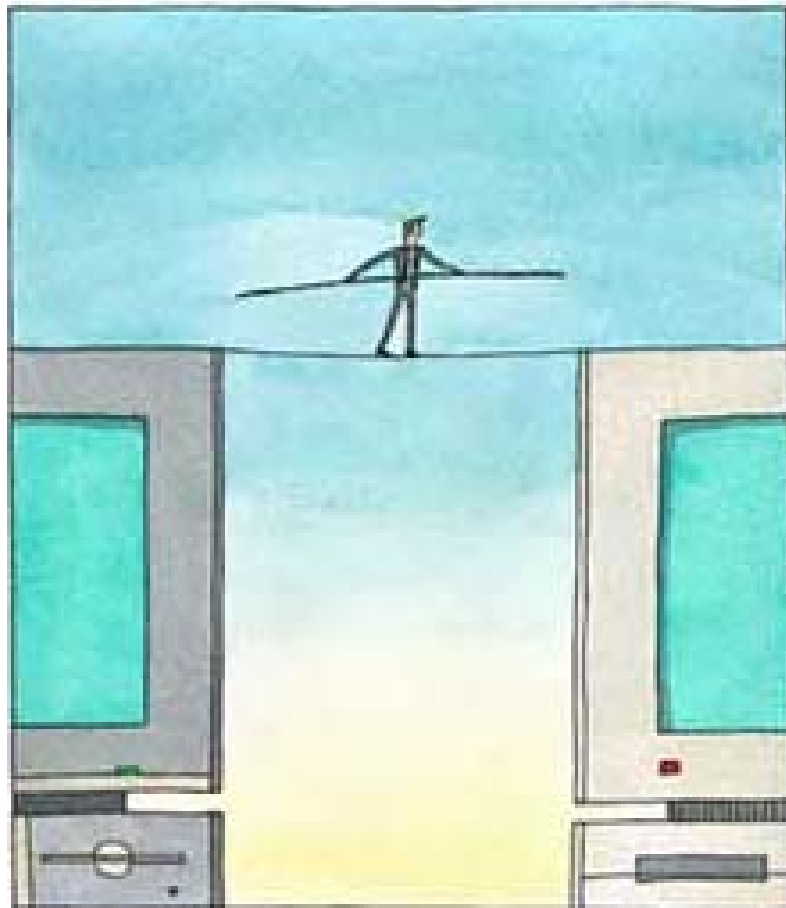
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Open Source does not mean “no support”



Commercial service providers can provide

- ✓ OSLs support
- ✓ hosting
- ✓ migration assistance
- training
- service level guarantees
- security audits

How Support Costs Might Compare

OSLS Support		
Year	Cost	Provider
2009	15,000	Liblime
2010	11,500	Liblime
2011	9,000	ByWater
2012	9,500	ByWater
2013	5,000	PLP

ILS Support		
Year	Cost	Provider
2009	15,000	Vendor
2010	17,500	Vendor
2011	20,000	Vendor
2012	23,000	Vendor
2013	25,000	Vendor

[Back](#)

Service Providers



DIY: Do it Yourself!

Evergreen

- William Jessup University (CA)

Koha

- Viborg Public (SD)
- Hopewell Public (NJ)
- Castleton Free Library (and others in VT)
- Plus lots of other special libraries...



Consortia Providing Support

- PINES (Georgia)

<http://www.georgialibraries.org/public/pines.php>



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<http://nexpresslibrary.org>



State Library Providing Support

- 28 public libraries
- funded by State Library using LSTA grant
- services include:
 - purchasing and maintaining the central servers
 - personnel costs in operating the system
 - training
 - software development
 - data conversion



[Back](#)

Open Source Community Norms

- Community has to agree on what gets rolled into next release
 - release management
 - forking is bad for everyone
- Quicker update cycle
 - releases happen when something important is developed
- The More the Merrier!

Current OSLS Development

Koha

- Control: rotating release managers
- Communication: Bugzilla
- Work done by: Koha-only development companies, contract developers, some library staff

Evergreen

- Control: Georgia Pines → Equinox (ESI)
- Communication: Mailing Lists
- Work done by: ESI based on big development contracts

<http://bugs.koha.org/>

- Tool used for keeping track of bugs and enhancements of software
- Mechanism for directly communicating with developers
- Publically available to anyone who creates a Bugzilla account



bugzilla

Bug# 3342

Summary: Changes to holds priority list should be logged for accountability.

Component: Hold Request

Description: [\[reply\]](#) **Opened:** 2009-06-19 15:11 When a library staff member changes a hold priority or moves a hold up or down the list, the change information should be logged to encourage accountability. Log information should include: - Which user did it - Date/Time stamp - Which Patron was moved and to which priority.

Reporter: [Liz Rea <wizzyrea@gmail.com>](mailto:wizzyrea@gmail.com)

Assigned To: [Galen Charlton <galen.charlton@liblime.com>](mailto:galen.charlton@liblime.com)

Hold-related Enhancement Requests

ID	Sev	Pri	Reporter	Status	Resolution	Summary
2786	enh	P3	oleonard@myacpl.org	NEW		Allow waiting holds to be diverted to different branch
2808	nor	P3	emily.funk@liblime.com	NEW		Hold queue not alphabetizing
2812	nor	P3	nahuel.angelinetti@biblibre...	NEW		In opac a user can cancel his holding
2813	nor	P3	rch@liblime.com	NEW		Holds to Pull (pendingreserves.pl) to be limited by SingleBranchMode
2830	cri	P3	beverly.church@liblime.com	NEW		Hold not removed when "trapped" item on hold shelf is checked out to a different patron in the holds queue
2954	enh	P3	oleonard@myacpl.org	NEW		Holds queue report should show date/time of last update
2966	nor	P3	emily.funk@liblime.com	NEW		Negative numbers in Not_Loan Authorized Values breaking OPAC holds
2970	enh	P3	oleonard@myacpl.org	NEW		Create a permission for modifying holds priority
2993	nor	P3	emily.funk@liblime.com	NEW		Itemtype 'not for loan' is allowing holds
3012	maj	P3	oleonard@myacpl.org	NEW		Cannot place a hold from search results on an in-transit item
3025	nor	PAT	nahuel.angelinetti@biblibre...	ASSI		bug with holds a multiple check-in
3054	nor	P5	mason.loves.sushi@gmail.com	NEW		Holds/reserves accountlines record contains NULL itemnumber
3060	maj	PAT	nicole.engard@liblime.com	NEW		item number not on holds to pull report
3093	enh	PAT	sedwards@alloycomputing.com	ASSI		Enhance placing of holds in staff interface
3142	nor	P5	galen.charlton@liblime.com	NEW		standardize how OPAC and staff determine requestability
3153	enh	P5	mcoalwell@nekls.org	NEW		'maxoutstanding' syspref does not disallow placing holds on staff side
3242	enh	P5	rch@liblime.com	NEW		emailLibrarianWhenHoldsPlaced system preference is non-functional
3342	enh	P5	wizzyrea@gmail.com	NEW		Changes to holds priority list should be logged for accountability.
3344	enh	P5	wizzyrea@gmail.com	NEW		Hold priority list needs additional status for items assigned but not waiting

[back](#)

“One of the great advantages of an Open Source Library System (OSLS) is the ability to
empower staff
and
optimize the user's experience
by
getting involved
in improving the software.”

When Libraries Develop OSLS

- You define requirements
- You select developer
- You define process
- You negotiate a price
- You pay when you have your “deliverable”



Save Money or Enhance Product



Use money saved in licensing fees to fund big development effort

Build in-house expertise for development initiatives

Coordinate development efforts with other libraries while reducing annual costs

Reduce annual costs dramatically by taking OSLS as it is

Next Generation Development Scenarios

Share-a-Developer

- Consortia hires a programmer
- Consortia prioritizes and manages development projects

Co-sponsor development

- “We want this”
- “You, too?”
- “Let’s share the cost”



[back](#)



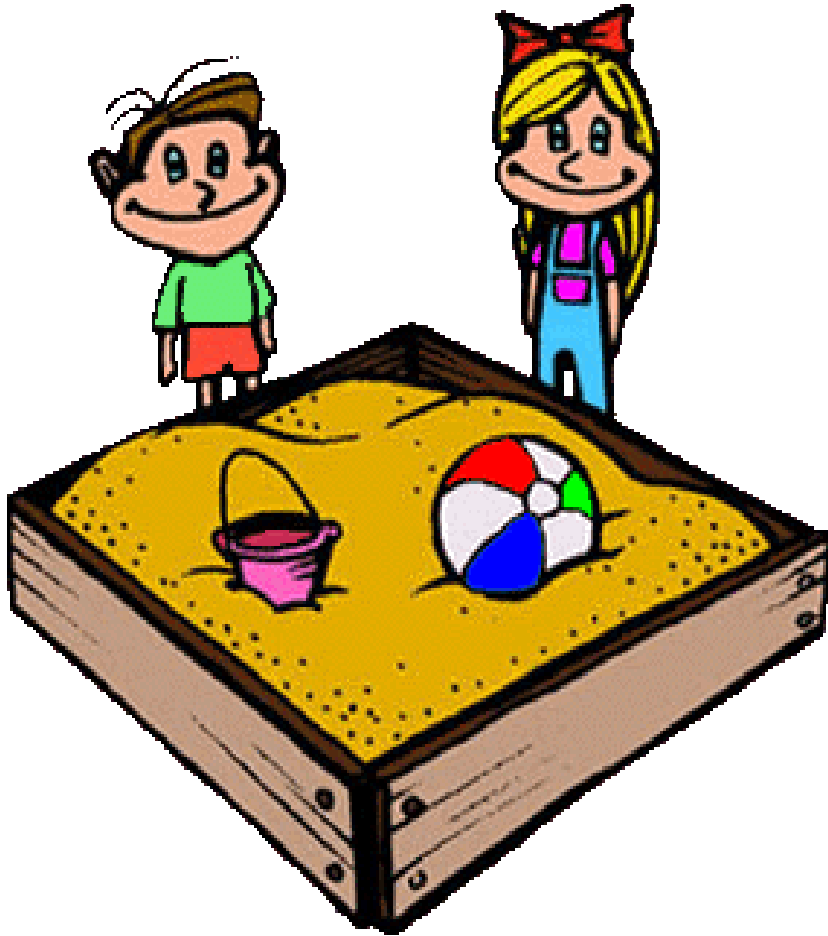
Collaboration California Style



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Year One Activities



- Deliver training
- Provide a demonstration environment (aka "sandbox") for Evergreen and Koha (Access via <http://opensource.califa.org>)
- Develop tools to help libraries analyze their needs and plan for migration
- Provide technical support

Year Two Activities

- Provide support for libraries migrating to Open Source
- Work on resource-sharing and delivery of materials statewide
- What do you need???



[back](#)

Twins Separated at Birth

Both Library and Open Source communities

- are committed to free access to information
- believe information is power
- trust and respect the community
- are not big on attaching “price tags” to things
- believe everyone has something important to contribute if given the right opportunities
- seek to empower users



[back](#)

“Sales”

Koha

- Showcase: <http://koha.org/showcase>
- Features: <http://koha.org/about/features>

Evergreen

- Showcase: http://evergreen-ils.org/dokuwiki/doku.php?id=evergreen_libraries
- Features: http://www.open-ils.org/dokuwiki/doku.php?id=faqs:evergreen_faq_2

Best way to determine if Koha or Evergreen are a good fit?

Download. Install. See for yourself.

[Back](#)

Big Library Systems

Koha

Howard County, MD

- Collection Size: 1 million
- Annual Circ: 5 million
- Main Library plus 5 branches

South Central Library System, WI

- 52 libraries
- 7 counties
- Annual Circ: 11.6 million
- Holds filled annually: 3 million
- Holdings: 826K

Evergreen

Georgia PINES

- 275 libraries
- 140 counties
- Collection size: 9.6 million books

Evergreen Indiana

- 38 libraries live (54 total)

KCLS (2010)

- 44 community libraries
- Annual circ: 20 million items

[Back](#)

Small Complex Koha Library

Mzuzu University Library, Malawi

- Collection: 16,671 volumes and 200 journal titles
- Classification: LC
- Holdings: Malawiana collection, reference collection, International Monetary Fund (IMF) collection, World Bank publications, United National Development Programme (UNDP), HIV/AIDS collection
- Includes a Children's Library annex for school children in and around Mzuzu University

And over 300 more....

- Stowe Monroe Falls Public Library
- Biblioteca Facultad de Ciencias Agropecuarias
- Hawaii State Archives
- Southeast Kansas Library System
- Presbyterian Theological Centre
- Jackson Labs
- Native Village of Afognak
- International Center for Hellenic and Mediterranean Studies
- Orange County Public Library
- Hutchinson Correctional Facility
- Minnesota Japanese School
- Quaranic Institut of Terengganu
- West Liberty Public Library
- Delhi Public Library (India)
- Devagiri College, Kozhikode
- Bell/Whittington Public Library
- Antioch University, Santa Barbara
- Nelsonville Public Library

[Back](#)

<http://oss4pl.org>

Vision:

An online community where public libraries of all sizes can share stories and software—where we can collaborate on technology projects and share ideas, code, documentation, hopes, dreams, successes...

Goal:

We want to help public libraries gain greater control, independence, flexibility, and value from the software that we use to serve our patrons and support the operational work of our library staff.

We hope to provide resources and encouragement to all public libraries that share this goal.

Members:

- KCLS
- Bibiomation
- Salt Lake County Library System
- Georgia PINES
- PLCMC
- Columbus Metropolitan
- Butte Silver Bow Public
- Carnegie Library of Pittsburg
- Peninsula Library System
- Baker County Library District
- Davis Monthan Air Force Base Library
- New City Library
- Your library?

[Back](#)

Evergreen

License: GNU GPL

History

- Developed by Georgia Public Library Service for PINES
- Went live in 2006
- Originally designed for consortia

Primary market

- U.S. public libraries

Installed base:

- 170 library systems (147 publics)
- Under 12 of those libraries are not part of consortia

User groups

- none

Development

- Primarily Equinox Software, Inc.
- Communication between users and developers primarily via mailing lists

Most useful webpage: <http://evergreen-ils.org/about.php>

- Evergreen demos, mailing lists, blogs
- FAQ
- Development roadmap
- Downloads

Blogs: <http://planet.evergreen-ils.org/>

Twitter: @esilibrary

Facebook: Evergreen

LinkedIn: Evergreen

Koha

License: GNU GPL

History

- Developed by Katipo Communications (New Zealand)
- Went live in 2000
- Designed for a single library to address Y2K problem

Primary market

- Smaller, international, school, special, and public libraries
- Howard County first big public library in U.S.

Installed Base

- Over 1000 libraries internationally
- first US library came online in 2005 (Nelsonville Public)

Two user groups

- KUDOS (U.S.)
- Kohala (France)

Development

- Distributed team composed of at least 80 contributors
- Core Development Team elects new leadership for each release
- Communication between users and developers primarily via koha.bugzilla.org

Most useful webpage: <http://koha.org/about/get-involved>

- Koha demos, mailing lists, blogs
- Development roadmap
- Support
- Sponsoring a project
- Test things and report bugs
- Suggest improvements
- Teach developers about library standards/process

Blogs

- Owen Leonard, Nelsonville Public Library <http://www.myacpl.org/koha/>
- South Central Library System <http://scls.typepad.com/link2koha/>
- Nicole Engard <http://blogs.liblime.com/open-sesame/>

Twitter: #koha

Facebook: Koha, Kudos

LinkedIn: Koha, Kudos

Service Providers

	Equinox	Liblime	ByWater Solutions	PTFS	Media Flex	AlphaG Consulting
Migration	Yes	Yes	Yes	Yes	Yes	Yes
Hosting	Yes	Yes	Yes	Yes	Yes	No
Support	Yes	Yes	Yes	Yes	Yes	Not sure
Custom Development	Yes	Yes	Maybe	Yes	Not sure	Yes
Products	Evergreen	Koha	Evergreen Koha	Evergreen Koha	OPALS	Evergreen Koha
Website	esilibrary.com	liblime.com	bywatersolutions.com	koha.ptfs.com	mediaflex.net	alphagconsulting.com