

Orbis Cascade Alliance

SILS Evaluation

With Council approval in July of a SILS Evaluation project, we must plan the execution of the project. Our high level goals remain to understand how the SILS has changed our work (for good & bad), how the SILS contributes to our strategic agenda, and how we can better work with Ex Libris.

Several other parties have examined Library Management Systems, including Vaughan (2004), ABDU (2015) and Cambridge Economics (currently underway). However, given we are evaluating our work within the SILS and the impact on our work by the SILS within the framework of our Strategic Agenda, we must borrow elements of the frameworks which help illuminate how our SILS and engagement with it help us achieve our strategic objectives. This chart identifies what areas we should examine, as identified by previous studies, and overlaid by our strategic plan.

Area of Assessment	Work Smart	Design for Engagement	Innovate to Transform
	Acquisitions	End User Interface	Consortial functionality enabled
	Alliance Central Staff Support	Resource Sharing	Network Zone Evaluation
	Central Resources to manage SILS processes	Shared Collections	Participation ability in new feature development
	Cost	Staff Interface	RFP Feature Delivery
	Fulfillment		
	Quality of Service		
	Reporting		
	Resource Management		
	Sandbox availability, Management & Testing		
	Tier 1 & 2 Support		

	Unique collections: resource management workflow		
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Overall Timeline

July 2016	Project authorized
August 2016	Board Review and Feedback on draft plan
October 2016	Plan redrafted in response to feedback; Re-review
November 2016	Council update; Groups formed
December 2016	Groups set calendars for meetings in January and beyond
December 2016	Coordinating Group design overall question format and survey, recruit pre-testers
January 2017	Survey questions discussed in small groups between January 9-20
February 2017	Survey pre-testers provide feedback
February 2017	Coordinating Group manages distribution of single survey (late January / early February)
March 2017	Coordinating Group conducts limited focus groups and/or follow up questions (limited; not comprehensive)
March / April	Release preliminary report
April 2017	Groups provide any requested data analysis to central staff
May 2017	Final report drafted and reviewed
June 14-15 2017	Board presentation
July 2017	Council presentation & Formation of SILS Negotiation Team

Specific Stage Goals

While the project has numerous goals, we are seeking achievement of the goals in several stages.

Stage 1: December 2016 - June 2017

- Conduct a high-level survey, allowing us to return to areas in the future for further analysis and understanding.
 - Understand how and where the SILS has met, exceeded, and underperformed our expectations. Acknowledging that baselines may vary across areas, and not everyone engaged with work now will have a strong sense of previous baselines. Try to understand expectations prior to adoption of the SILS and the current state.
 - Document how the SILS contributes to the Alliance's strategic agenda, including supporting a collaborative workforce.
 - Assist in understanding how we might better work with Ex Libris.

- Engage with the most knowledgeable stakeholders to guide and support analysis.

Stage 2: July 2017 - March 2018

- Significant focus is on negotiation with Ex Libris and impact on areas identified in June 2017 final report
- Teams can engage in any further analysis from the outcomes that fits within their existing Team goals
- Council, Board and Teams plan for further inclusion and analysis of outcomes in future projects and strategic plan

Stage 3: March 2019 +

- Incorporation into and execution of items in strategic plans as appropriate

Plan

As the project is so large, we are breaking the project up into sections that can be completed by smaller groups, working independently but coordinated by a Coordinating Group. Each small group must develop survey questions, for inclusion in the final analysis. Teams and Council members will be asked to volunteer names for small groups of about 6 people who will meet as a group and develop questions in their areas. The Coordinating Group Member will coordinate a phone call with each group to review and develop questions.

Where multiple Coordinating Group members are listed, each group will examine this area and suggest questions as necessary.

Group	Issue	Detail	Coordinating Member
1	Acquisitions functionality / workflow / ERM	Compare from expected outcomes and actual implementation of the SILS processes look for areas where there is improvement or regression; and where there are opportunities for greater collaboration	Michael
2	Alliance Central Staff Support	Solicit feedback in survey on how central staff supports members in learning about and using the SILS	All / Faye
3	Central Resources to manage SILS	Assess how members work centrally (e.g. in Teams / Working Groups) to support the SILS and identify	Dana

	Processes	any other processes which should be centrally managed	
4	Consortial functionality delivered	Ask questions about consortial functionality initially desired but not delivered by Ex Libris as of the survey	Faye / All
5	Cost	Re-examine TCO Study and examine what costs exist now. This section includes staffing changes for the SILS (both added and reduced staffing).	Faye
6	End User interface (Discovery)	Review existing studies and conduct new work as necessary. Include accessibility and compliance in analysis	Annie Dana
7	Network Zone Evaluation	Compare processes from expected outcomes and actual implementation of the SILS and look for areas where this is an improvement; and where there are opportunities for greater collaboration	Michael
8	Participation in new feature development	Review Alma & Primo enhancement process and other new feature development process and assess for optimal participation	Craig
9	Quality of Service	As the system now reliably is “up”, we must move beyond simple SLA uptime and examine service performance and the impact of disruptions that occur while Alma and Primo are technically online. (Public service focus on impact of downtime or performance degradation.)	Craig Annie
10	Reporting & Analytics	Examine ILS reporting capabilities with expectations for reporting, and who can initiate the reports (operational reports and Analytics)	Craig Annie Michael
11	Resource Management	Compare from expected outcomes and actual implementation of the SILS for areas where this is an improvement or regression; and where there are opportunities for greater collaboration	Michael
12	Fulfillment	Compare from expected outcomes and actual implementation of the SILS for areas where this is an improvement or regression; and where there	Annie

		are opportunities for greater collaboration	
13	Resource Sharing	Compare from expected outcomes and actual implementation of the SILS for areas where this is an improvement or regression; and where there are opportunities for greater collaboration Examine other processes for comparison (such as INN-REACH and OCLC NRE).	Annie
-- Delayed	RFP Feature Delivery	Compare RFP to current state; examine previous work . (Consider removing or delaying; does it really help our purpose?)	-
15	Sandbox availability, management and testing	Assess sandbox availability, management and testing	Dana
16	Staff Interface	Solicit feedback on Alma interface	Each group
17	Shared Collections	Compare from expected outcomes and actual implementation of the SILS for areas where this is an improvement or regression; and where there are opportunities for greater collaboration	Dana
18	Tier 1 & 2 Support	Assess if people know where to go for support, and how effective the support is	Craig Annie
19	Unique Collections: resource management workflow	Compare from expected outcomes and actual implementation of the SILS for areas where this is an improvement or regression; and where there are opportunities for greater collaboration	Dana
20	Degradation & Surprise Improvements (Benefits)	Analyze degradation in quality / change from Millennium and other predecessor systems Identify found new functionality; exceeded expectations; better than promised; enables new work that we hadn't expected	All / Faye

SILS Evaluation Coordination Group Members

- Faye Chadwell (Chair), Oregon State University
- Dana Bostrom, Orbis Cascade Alliance
- Craig Milberg, Willamette University
- Michael Boock, Oregon State University
- Annie Downey, Reed College

Role of Coordination Group & Alliance members

The Coordination Group will guide the overall project and work with the numerous subject experts engaged on the project.

Specifically, the Coordination Group will:

- authorize the formation of small groups to focus the questions and areas for examination
- provide overall guidance on construction of survey questions
- review overlapping areas for unnecessary overlap in questions
- release the survey
- facilitate any follow up questions
- lead analysis of data

Small groups will map any processes, as necessary, before and after SILS adoption, or (sometimes) comparing to another superior practice.