

ILS and Discovery Layer Evaluation Draft Project Plan 2024-25

December 6, 2023

Link to 2017-2018 ILS Evaluation documents: <https://www.scls.info/ils-evaluation-2017-2018>

Roles and Responsibilities of Groups

ILS Committee

- Votes on whether or not to proceed with an evaluation
- Approves the draft project plan and timeline
- Defines representational makeup of topic and lead workgroups
 - ILS staff will solicit volunteers for module workgroups
 - Volunteers note whether they would also like to be on the Lead Workgroup
 - Determine Lead Workgroup members based on cluster representation
 - Each module workgroup will have a liaison from the Lead Workgroup
- Approves membership of Lead Workgroup
- Oversees the Lead Workgroup

ILS Evaluation Lead Workgroup

- Approves final project plan and timeline
- Develops evaluation process
 - Oversees checklists for topic workgroups
 - Identifies overall priorities for selection
- Develops preliminary evaluation document which will also be incorporated into the final evaluation
- Approves vendors to participate in demos based on preliminary evaluation
 - ILS software
 - Innovative Interfaces's Polaris Leap
 - SirsiDynix's SymphonyWeb
 - Note: LibLime's Bibliovation will be part of final evaluation but no demos will be scheduled
 - Discovery Layers
 - To be determined in early 2024
- Assists with planning of demos
- Members attend all demos
- Coordinates site visits and/or phone calls to customer sites
- Compiles final evaluation document to be submitted to the ILS Committee

*Indicates firm meeting dates & milestones

ILS Evaluation Topic Work Groups

Proposed topic areas

- Technology Support (SCLS Staff)
- System Administration (SCLS Staff)
- Database authentication (SCLS Staff)
- Vendor viability (SCLS Staff)
- Discovery Layer [includes web support and accessibility]
- Circulation and Patron
- Holds [incorporated into Circulation (Staff) and Discovery Layer (Patron)]
- Self Check/RFID/Sorters/Gates
- Cataloging
- Acquisitions
- Serials
- Reports

Roles & responsibilities

- Identifies priorities for topic
- Finalizes and approve checklists
- Members attend all demos for their topic
- Members attend site visits (optional)
- Creates follow-up questions for vendors
- Creates final report for lead workgroup

Proposed Detailed Timeline

- ~~*October 5, 2023 ILS Committee meeting:~~
 - Votes on whether to proceed with evaluation
- * December 6, 2023 ILS Committee meeting
 - Approves the draft project plan and timeline
- December 2023 / January 2024 Recruitment for lead and module workgroups
- *February 7, 2024 ILS Committee meeting
 - Approves membership of Lead Workgroup
- February 2024 Lead Workgroup meets to:
 - Select members of topic groups
 - Plan for virtual demos in May 2024
 - Discuss options for Discovery Layers
 - Discuss meeting schedule
- February / March 2024 ILS staff schedule virtual demos for May 2024
- March 2024 Work groups meet to develop demo checklists
- *April 3-5, 2023 SCLS and library staff attend PLA Conference
 - Attend Discovery Layer demos
 - Meet with Discovery Layer vendors

*Indicates firm meeting dates & milestones

- April 2024 ILS Committee meeting
- April 2024 (post PLA) Lead Workgroup meets to:
 - Choose Discovery Layers to evaluate
 - Finalize demo checklists for modules
- May 2024 Virtual Vendor demos
- Summer 2024
 - SCLS staff conduct virtual visits with system and technology staff for ILS products
 - SCLS staff compare bugs and development wish list against ILS products
 - SCLS staff compile follow-up questions for vendors and compile answers
 - Lead workgroup selects sites and plans for fall site visits
 - Schedule fall site visits
 - Hold Virtual Discovery Layer demos
 - Develop questions for site visits
- September / October 2024 In person Site visits
- September / October 2024 Virtual site visits?
- November / December 2024 Compile follow-up questions for site visits
- November / December 2024 module workgroups prepare preliminary reports
- December 2024 / January 2025 Lead workgroup prepares preliminary reports
- February 5, 2025 ILS Committee meeting
 - Preliminary reports presented to ILS Committee
- February / March 2025 Module workgroups prepare final reports
- February / March 2025 Lead workgroup prepares final reports
- April 2, 2025 ILS Committee meeting
 - Final report/proposal reviewed by ILS Committee
- May 2025 Final report/proposal will be sent to Directors
- May 15, 2025 All Director's meeting
 - ILS Evaluation presentation of final report
 - Discussion of final report
- May / June 2025 Final follow-up post All Directors
- July 17, 2025 All Director's meeting
 - Additional discussion
- July 2025 Voting opens
- July 2025 Voting closes
- *DATE 2025/2026 Date by which we must notify LibLime if not renewing agreement
- DATE 2025/2026 If a new vendor is selected, data migration, training, etc. will occur (or ask LibLime for an extension on agreement)
- *DATE 2026 Agreement with LibLime ends (if not renewed)
- *May 2026 Subscription to Syndetics Unbound expires
- *2027 Subscription to Solus mobile app expires

*Indicates firm meeting dates & milestones