#### Project Overview

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| **1.1 Name** | VALE Open-Source Library System (OLS) Project |
| **1.2 Document Date** | July 25, 2011 |
| **1.3 Stakeholders** | Project Sponsor: VALE NJ Academic Library Consortium  Customer: VALE Member Libraries |
| **1.4 Project Manager** | Anne Ciliberti, Marianne Gaunt; Co-Chairs, VALE OLS Steering Committee |
| **1.5 Email Address and/or Website** | VALE OLS Steering Committee Website: <http://www.valenj.org/committees/vale-ols-steering>  VALE OLS Steering Committee Listserv: [vosc-l@tcnjlists.tcnj.edu](mailto:vosc-l@tcnjlists.tcnj.edu) |
| **1.6 Goal Statement** | The goal of the VALE OLS Project is to advance the teaching, learning and research activities of New Jersey’s higher education community by implementing a shared open-source library management system which expands access to scholarly materials, both print and digital, and which promotes resource sharing among participants. |
| **1.7 Description and/or Background** | For a number of years a VALE Open Library Systems (OLS) team has been working on a new vision for the VALE consortium, one in which New Jersey academic libraries would, where possible, unify policies, collaborate in their operations, and work to provide a sum greater than their parts. Part of this vision is the adoption of a shared, open-source, library system that will allow us to coordinate and support online services delivered at the network level yet decrease our reliance on commercial system vendors. Since 2007 VALE members have evaluated several open-source library products, including Evergreen and Koha, and determined that the efforts and potential of OLE are most aligned with this vision for VALE’s future. |
| **1.8 Objectives** | When implemented, the VALE-OLS will allow New Jersey’s academic libraries to:   1. Participate in a shared, community-developed, next-generation library system that is efficient and easy to use for no more than the cost of what one would pay for a stand-alone legacy ILS. 2. Offer users an online system that allows both resource discovery and direct borrowing across the combined holdings of member institutions. Users may borrow materials directly from member libraries by requesting them through the system and have them delivered to their own library 3. Standardize how we acquire, catalog and loan materials in order to improve resource sharing and promote discovery of unique collections 4. Benefit from new products developed by the OLE user community responding to its individual and collective needs, and from the ability of VALE to adapt these products to its goals and ends 5. Enable library systems to communicate seamlessly with financial (ERP), learning management (LMS) and other institutional enterprise systems. |
| **1.9 Scope** | The scope of the project is to research available open-source library systems, select the best choice for the VALE community,prepare for, test and implement the selected software. Creating [i.e., writing the code for] a new OLS is not in scope. |
| **1.10 Schedule** | 2010: Project start  2011: Preparation for implementation  2012: First test installation (Assuming that OLE is completed on schedule)  2013: First early implementing institution in production  2014: All early implementing institutions in production  2015: First adopters going into production  All migration dates are dependent on academic year, i.e., all migrations will take place over the summer.  After the all early implementers are in production, at a time recommended by the Steering Committee and approved by the VALE Executive Committee, the Implementation Task Force will cease to exist. Its role will be carried out by the VALE OLS Technical Subcommittee. |
| **1.11 Time Reporting** | Indicate what, if any, time reporting tools will be used for this project, for example, CacTrack.  [TBD] |
| **1.12 Oversight and/or Reviews Planned** | The Implementation Task Force is under the general oversight of the Steering Committee; the Steering Committee is under the oversight of the VALE Executive Committee. The Steering Committee Chair (or Liaison) report out regularly at VALE Executive Committee and VALE Members’ Council meetings. |

#### Project Resources

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| **2.1 Project Team** | The VALE OLS project team has a bicameral structure: an Implementation Task Force, comprised of representatives from the 5 early implementing institutions, and a Steering Committee, comprised of representatives elected from all project participants. For current rosters, see the respective committee pages on the VALE site <[valenj.org](http://valenj.org/)>; for a full description of duties see the governance document on the Steering Committee page <<http://www.valenj.org/committees/vale-ols-steering>>. |
| **2.2 Cost Estimate** | **For Major Projects:** State the rough cost estimate for the project, both for development and on-going support costs. **Note:** Start with a rough estimate, but as the project moves through each phase of the lifecycle, this estimate will become more detailed and may be very different than your original.  [TBD] |
| **2.3 Customer Involvement** | During the development phase, the VALE OLS project exists on a purely volunteer basis. Once the project enters the production phase, institutions will be asked to sign a membership agreement. The initial cost of membership shall be equal to or less than any VALE member institution’s commitment to its current ILS in the year that it joins VALE OLS. The annual cost of membership (as determined by the Steering Committee) will reflect the actual cost of running the system, including both operational and development costs. Members have input into business decisions via their representatives on the Steering Committee, although they are not required to do so. Institutions who wish to participate in VALE-OLS can do so at no risk to their current collection or library automation system. They will be able to test VALE-OLS with their own data before making any commitment to join. All participating institutions are responsible for cleaning their own bibliographic data. |

#### Assumptions, Constraints, Dependencies, Impacts and Risks

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| **3.1 Assumptions** | * That all VALE institutions who initially indicated that they would participate actually do so. * That institutions who currently participate will continue to do so. * That all participating VALE institutions will be able to develop and agree upon the unified policy structures necessary to implement a single-instance shared system. * That the Kuali OLE software, when completed, will be released as open-source. * That the Kuali OLE software, when completed, will need at least some amount of customization. |
| **3.2 Constraints** | This project will be constrained by the available start-up funds.  The schedule will be constrained by the Kuali OLE project’ schedule.  Because of the volunteer nature of much of the work involved, the project is constrained by available human resources. |
| **3.3 Dependencies** | The project depends on the Kuali OLE project both meeting its project objectives in general, and meeting them on schedule.  The project depends on the VALE Implementation Team (or other individuals to be named, whether members of the Kuali OLE community or hired by VALE) providing any necessary customization of the OLE software. |
| **3.4 Impacts** | When implemented, VALE-OLS will allow New Jersey’s academic libraries to ...   * Participate in a shared, community-developed, next-generation library system that is efficient and easy to use for no more than the cost of what one would pay for a stand-alone legacy ILS. * Offer users an online system that allows both resource discovery and direct borrowing across the combined holdings of member institutions. Users may borrow materials directly from member libraries by requesting them through the system and have them delivered to their own library * Standardize how we acquire, catalog and loan materials in order to improve resource sharing and promote discovery of unique collections * Benefit from new products developed by the OLE user community responding to its individual and collective needs, and from the ability of VALE to adapt these products to its goals and ends * Enable library systems to communicate seamlessly with financial (ERP), learning management (LMS) and other institutional enterprise systems. |
| **3.5 Risks** | That the VALE OLS, when implemented, would not perform at the level anticipated, leading participating institutions to need to migrate to other systems.  That the VALE OLS, when implemented, would not perform at the level anticipated, leading to possible legal action by participants. |

#### Deliverables, Expected Outcomes

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| **4.1 Key Deliverables** | Implementation Task Force Deliverables   1. Complete selection of a discovery tool 2. Determine technical requirements 3. Develop criteria for data clean-up (specifically holdings) 4. Develop protocols for data migration   Steering Committee Deliverables   1. Develop a communications/ marketing plan 2. Determine common circulation criteria 3. Develop funding plan for startup phase 4. Develop a business model for operating phase |
| **4.2 Communication Plan** | [This prose is ad-hoc; will be replaced by communications plan when completed by Gus and approved by the VOSC]  The Implementation Task Force reports to the Steering Committee. The Steering Committee maintains a VALE OLS Project Progress Report page on the VALE website < <http://www.valenj.org/committee/vale-ols-steering/vale-ols-steering-progress-report-update>>. Minutes of the meetings of both groups are posted on the respective committee pages on the VALE site <<http://www.valenj.org/committees>> |
| **4.3 Success Criteria** | The project will be completed once a stable OLS is in place and functioning adequately for all participants. Individual participants will use whatever criteria their institution decides on to determine if final deliverable is satisfactory. (An initial assumption was that the final functionality was to be at least the same or better than any participants legacy ILS.) |

#### Reviews and Approvals

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| **5.1 Review History** | VALE OLS Project Steering Committee   * Approved preliminarily 7/25/11   VALE Executive Committee |