

OWLSnet Planning Process Proposal
Submitted to the AAC by Rick Krumwiede
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Background

In early May 2004, OWLSnet began working on migration to a new Integrated Library System (ILS). Consequently, most of OWLSnet's time and energy over the past two years has been devoted to the migration: selecting a vendor, configuring the new vendor's ILS, migrating data to the ILS, training staff at member libraries, actually beginning to use the new system, developing and producing reports, and adapting workflow to work as efficiently as possible with the new ILS. In short, there hasn't been time to concentrate on much else.

While many tasks remain before the migration can be considered complete, we are clearly approaching the end of the "migration." We know that the Innovative Millennium ILS is undergoing continual development by Innovative Interfaces, Inc., and we have many choices of features that we could implement. We also know that we want to keep developing InfoSoup and improving how we use the Millennium features that we now have.

Because OWLSnet libraries have many needs and interests, because there are many possibilities for services that OWLSnet could offer, and because we have limited resources, now is a good time to ask the question, What Next?

Proposal

It is proposed that OWLSnet engage in a planning process which will include the following activities:

- An assessment of member library automation needs with an opportunity for grass roots input about OWLSnet services and support.
- A review of the relevance, efficiency, and effectiveness of our governance and decision-making structure, resulting in the identification of issues that should be addressed and recommendations for addressing any identified issues.
- The identification of short-term priorities for the development of OWLSnet services and preparation of recommendations for a process to regularly determine service and development priorities.
- The identification of areas in need of new or updated policies or procedures and recommendations for achieving uniform compliance with agreed upon policies and procedures.
- The identification of any additional issues that need to be addressed by the OWLSnet membership.

Methodology

It is proposed that a planning committee be appointed to draft a plan for recommendation to the AAC. The committee should be representative of the geography, sizes of libraries, and types of libraries within OWLSnet. For example, it would seem appropriate to appoint a seven member committee consisting of one representative each from OWLS, NFLS, APL, a larger OWLS library, and smaller OWLS library, an NFLS county library, and an NFLS independent library. Volunteers will be solicited, but committee appointments would be made jointly by the OWLS and NFLS directors.

Because it is important that any committee have lots of input and feedback from all OWLSnet member libraries, multiple opportunities for input and involvement of the entire membership would be provided, including, but not limited to, the following:

- Regularly survey or otherwise solicit input and feedback from all member libraries.
- Holding open meetings and encouraging non-members of the committee to attend meetings.
- Electronically disseminate all committee activities and documents including meeting notices, meeting notes, issue papers, working documents, or draft plans.
- Holding a hearing on the proposed plan prior to presenting it to AAC for approval.

The plan as approved by the AAC would be presented to the OWLS Board for formal approval. The approved plan would serve as the basis for revising the OWLS and NFLS system technology plans.

Timetable

It is proposed that the planning committee hold at least four meetings over the next few months, e.g., September, November, February, April. It is anticipated that some sort of planning exercise would be conducted at the October AAC meeting, and it is likely that a hearing on the draft plan would be held at the March meeting. It is hoped that final approval of the plan would occur at the May AAC meeting.