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COMO WHITE PAPER

Small and Open Source: Decisions and Implementation of an Open Source Integrated Library System in a Small Private College

by Lyn H. Dennison and Alana Faye Lewis

The Paine College Collins-Callaway Library was able to move from a proprietary integrated library system (ILS) to a hosted, open source ILS over a two-month period in the summer of 2010. The Library was able to implement the changes with no new budget and a small staff.

The Paine College Library serves a campus of 900 students with a small staff and a tight budget. Since 1999, the Library has used an integrated library system (ILS) from a proprietary vendor. The ILS was well known and respected, but it was designed for large and complex libraries. The Library staff and campus information technology staff had extensive training in its use at the time of implementation. The server was located in the Library and was maintained by the campus technology staff, and the Circulation Manager served as the system administrator. Over the next several years, most of the knowledge about the system was lost to staff turnover. By 2007, all of the people with system training and experience were gone, except for the cataloging assistant. In 2008, webinar training was completed by some staff, but in general, the system was too complex and difficult to manage

without significant devotion of time and effort beyond usual duties.

Additional concerns were the increasing annual costs of the license and maintenance contract, even as the server and system were aging. With a limited budget and even less expertise or time to handle the upgrades or new features, the older version became increasingly less effective. The ILS vendor offered a hosted solution but the cost was prohibitive. The Library was facing the pressing need for a new server and a system upgrade, without the necessary resources.

The success of open source ILS implementation in public libraries in Georgia piqued interest in an open source solution for the Library. Although staff members were not completely satisfied with our proprietary system, they were anxious about the time and effort required for implementing a new one. They also had concerns about the ability of an open source system to be able to do things they were used to doing.

The Library began looking into open source ILS in 2008 and became interested in Koha due to its track

record, international implementation, awards, and options for being hosted. Koha was written by a New Zealand web design company for a New Zealand public library, and was first implemented in 2000.¹ It was specifically written to be an open source integrated library system. It has since been implemented throughout the world and the first implementation in the U.S. was in 2003.² As is supposed to happen for open source software, many more features have been added by the Koha community.

When the Library first began exploring Koha, it seemed most of the hosting and migration companies were from outside of the U.S., but a few were implementing in this country.³ In spring of 2008, one of the hosting companies provided a demonstration of Koha to the Library staff. They were able to see that most of our needs could be met by Koha, but there were still concerns about the learning curve.

The company that had demonstrated the system provided a quote for an annual hosting fee that came in at about twenty percent of the cost of the annual proprietary ILS fees.

Additional one-time costs for training and data migration were about 125% of current ILS costs, but after the one-time costs were paid, eighty percent of that budget line could be freed up for other library resources in perpetuity. Unfortunately, the one-time upfront costs were a barrier, since in times of financial constraint the Library was expected to find the money within its budget. Funding the one-time costs would have required the Library to drop significant electronic resources for two years, which did not seem feasible.

The idea languished for another year, but the Library remained interested and increasingly concerned about its aging proprietary system. During that time, Koha had undergone some growing pains. One company did not want to release code it had developed for its Koha clients,⁴ and then it was eventually purchased by another company.⁵ The Koha

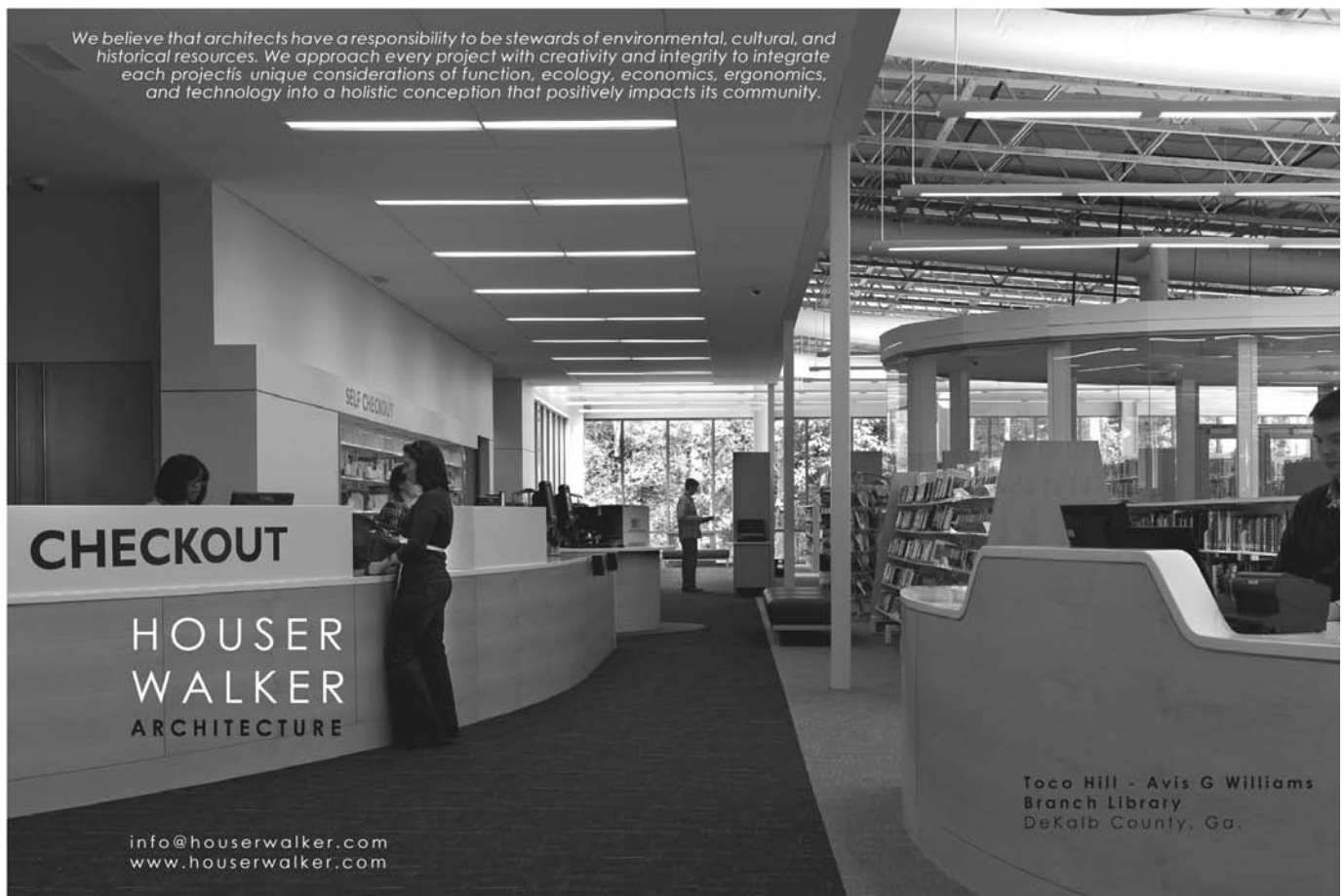
community split into two factions,⁶ and the idea arose that open source hosting may have some unforeseen pitfalls. However, Koha itself seemed stable and vibrant.

The Library reached a point at which a decision was required: either spend money upgrading our proprietary system or spend it moving to an open source system. The FY2011 budget process began in February 2010, and once again, the money had to come from the Library's current budget. This time the Library was in conversation with a different Koha hosting company. The difficulty of funding the upfront costs of migration and training was openly discussed with them. At that point, a mutually acceptable position of financing the upfront costs over a three-year period became a viable option. The only difference would be that the Library would be held to a three-year contract with the company

rather than the usual one-year contract. With those costs spread over three years, the Library would actually see a small savings in year two, and a larger one in year three, and the full 80% savings in year four. In order for the budget to work, however, the new contract had to begin in June of 2010 and end the proprietary contract by July 31. That gave the Library only a two-month implementation window, but the decision was made to do it.

Things moved quickly after that. A flat budget was submitted in March 2010, the new contract was signed in April, the first migration conference call was made on June 3, and the new system was functional and live on August 2, 2010.

The campus IT department attended the first migration conference call. It was determined that the only role they needed to play was to provide



access to the legacy server and to provide student data from our campus enterprise system.

For the next five weeks, the hosting company extracted data from the legacy system and wrote scripts to prepare the data for import into the Koha system. The Library staff began using a demonstration system with full staff privileges to explore Koha. Having this kind of full access prior to implementation was another advantage of an open source system. The Library staff was rightly concerned about the fast implementation schedule, so they were motivated to use the demonstration system. Two people spent significant time in the cataloging module, and others spent time in the circulation module and its related components. In general, staff seemed to learn best by working together for a while and then spending some time exploring on their own. A few phone calls and emails occurred between the hosting company and the Library to answer questions about our data during those weeks.

Onsite training was deliberately scheduled after summer school had ended and staff attended three days of training. This was week six of implementation. The bibliographic data and basic patron data were loaded and ready to use in the test database. Training was taught by module. A few staff attended all of the sessions and the rest of the staff attended only those sessions that were relevant to their duties. The time spent with the demonstration system proved to be worthwhile, since the focus could be specifically on the best way to do things, rather than learning how to navigate the system. The training session was also the time when the administrative options were chosen for setting up the system to display and perform for local preferences. Some areas still needed additional setup, but when the training was finished, the system

was functional. Weeks 7 and 8 were probably the most intense as data was tested, problems found and reported, and data displays were worked on. We had a conference call each week with the hosting company staff, and were able to get many things resolved quickly. Final data loads were completed on July 30.

On Aug. 2, the legacy system had been disabled, and the online catalog link pointed to our new Koha catalog. As the students did not start classes until August 10, we continued to work on tweaking the final catalog.

The only somewhat significant hitch was transferring patron data from the campus system into Koha. All of the legacy patron information could easily have been transferred by the hosting company, but instead the Library chose to transfer only their names, barcode, and fine record. The plan was to update the rest of the information with the most current campus student records. The IT department was involved in various campus-wide initiatives at the time, and could not provide that information right away. They also discovered that the information was not as retrievable as originally believed. Some consequences have been that some of the personalized features and the email notification system could not be used until the data was loaded, but these did not hinder the functionality of the system.

The Koha OPAC options are much improved over the legacy system. Although the previous system provided ways to improve the OPAC, it required a level of expertise not available among our small staff. Many of the OPAC options in Koha are easily accessible, and often just involve making a choice from a pull down menu.

Financially, significant annual savings will occur over the former proprietary

system within a couple of years and those savings will be redirected to purchase more library resources. The IT department is pleased to have one less server to maintain. The Library staff is able to handle the administrative functions of their module on their own, and they may also contact the hosting company for assistance.

In summary, choosing a hosted open source ILS was the right choice for the Library. Using a hosting company is an excellent way for a small library to obtain specific ILS expertise at a reasonable cost. Before making a decision, the companies should be researched, news of the companies followed, and references from other libraries should be obtained. Choosing the hosting company is the most important aspect for a small library, since they will be the installation and maintenance experts. By using a hosted Koha system, the Library has distributed the work of maintaining an ILS, saved money to use for new resources, and improved the online catalog. ►►

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Endnotes:

¹ JoAnn Ranson, "How Hard Can It Be? : Developing in Open Source," *Code{4}lib*, no. 7 (June 26, 2009), <http://journal.code4lib.org/articles/1638>.

² "History," *Koha Library Software Community*, <http://koha-community.org/about/history/>.

³ "Pay for Support," *Koha - Open Source Library System*, <http://koha.org/support/pay-for-support>.

⁴ Nathan Willis, "Koha community squares off against commercial fork," *LWN.net*, May 5, 2010, <http://lwn.net/Articles/386284/>.

⁵ Marshall Breeding, "LibLime Acquisition by PTFs Marks a New Era for Koha," *LibraryJournal.com* (January 13, 2010), <http://www.libraryjournal.com/article/CA6714841.html>.

⁶ Galen Charlton, "Home of the Koha Community," *Koha Library Software Community*, February 2, 2010, <http://koha-community.org/home/>.