Report of the Executive Director to the User Council and Executive Committee of the Consortium of MnPALS Libraries

Sept. 9, 2010
Stephen Elfstrand
PALS Executive Director
Strategic Plan Goals

- Maintain Excellent Customer Service
- Continued Support of Aleph
- Financial Sustainability
- Expand Product Suite (beyond ILS)
- Expand Customer Base
- Collaborate with customers, vendors, campuses (& Open Source Communities)
- Culture of Innovation, Creativity and Exploration
Strategic Plan Update

- Significant progress on most of the Goals, Strategies and Actions
- Time to update and revise plan in light of successes, challenges and current conditions
- Present updated draft plan plan at Feb UC / EC Meeting
Scenario Planning

- Time to look at a longer time horizon (15 yrs)
- Think outside the box
- Working with Mn Management Analysis and Development consultant
Maintain Excellent Customer Service

- Continue to receive highly complementary comments on PALS service
- Acq / Serials Module Training
  - 3 sessions
- Many new answers
- Support Incidents
Director Site Visits

- SSCTC, Hennepin Tech, Pine Tech, Itasca CC, Bemidji State Univ., NW Tech Bemidji, Central Lakes CC.
- Also stopped in Kitchagami RLS
- St Ben’s / St John’s
- Next: Southeast Region
Continued Support of **Aleph**

- **Authorities**
  - Completed updating of Authorities per Auth TF
  - Retrospective flipping in process
  - Deleted unlinked headings
  - Continue to work with Authorities Task Force

- **Reports**
Aleph Continued

- Reindexing
  - RDA
- Mass change of obsolete indicators, codes
Move up to November
Aleph - Future

- No specific End of Life
- Could be on Aleph indefinitely
PALS Financial Reports

- In Executive committee Packets
- Sent to Deans Directors and Coordinator
Financial Sustainability

- PALS Operating deficit 1/3 Smaller than expected in FY10
- Still projecting annual deficits
- Increased revenue from Open Source Products
- Will be solvent through FY14
- Cutting expenses remains important
Cutting Expenses Ideas

- Commodity vs Sun HW
- Linux vs Solaris OS
- Share MSU Mass Storage instead of replacing our SAN
- Open Source Library System instead of paying SW Maintenance
Expand Product Suite (beyond Aleph)

- Open Source ILS - Evergreen
- Discovery Tool – MnPALS Plus
- PALSconnect Linker – OS OpenURL Link Resolver
- PALSconnect ERM – OS Electronic Resource Management System
- Proxy Services
Tracking time and effort on Projects and products

- (Including Aleph)
- Are they “profitable”?
- Should we keep doing?
- Are they priced appropriately?
Evergreen Open Source ILS

- East Central Regional Library
  - Completed migration, training
  - PALS is Hosting and providing ongoing support
- ECRL in Production on schedule in May, 2010
- Happy customer
- Looking for more customers
Evergreen Cont.

- ECRL / PALS Joint Presentations at MnLINK User Group & MLA
- PALS a Sub-recipient for IMLS grant
  - King County Library Systems (WA)
- PALS a Member of Governance Committee for Evergreen Foundation
- PALS staff on Web, Documentation and Reports groups
Version 2.0 – Jan 2011

- Serials
- Acquisitions
- Faceted Searching in OPAC
- “Basic” Authority Control
- Improved Client displays and workflow
  - Based on KCLS development
Discovery: MnPALS Plus 2.0

- Blank ILL book and journal request forms
- Patron can now select the ILL Unit
- OCLC number search for WorldCat & WCL
- Search Scopes with Logical Bases
- Delivered to new ver. to ODIN
MnPALS Plus - next steps

- Allow MnPALS Plus to receive ILL requests from PALSconnect LINKER and other OpenURL resolvers
- Allow users to specify pickup location for holds if the library has multiple circ units
- Mn Digital Library Records
Find full text: PALSconnect Linker

- Open Source OpenURL Link resolver
- Economical - Ask for Quote
- 13 customers
- OCLC will cease to support for Link Manager (outside of WorldCat Local)
Manage E-Resources: PALSconnect ERM

- Open Source Electronic Resource Management
- Two Customers
- Beta ends in Sept.
- Continuing feature implementation and development
Expand Product Suite  - What’s Next?
The Missing Piece – Web Scale Discovery
Federated Search

- Is it obsolete?
- What is the demand?
- Where would $$$ come from?
- Commercial examples– Metalib, 360 Search
- PAZPAR2 and Masterkey
  - Blended Open Source /Commercial Solution
Consolidated Search

- Commercial examples – Summon, Primo Central, etc.
- Open Source
  - Harvest Open Access data, Public databases Medline etc.
  - Harvest Metadata from Commercial Vendors
  - Present in Discovery Tool (MnPALS Plus, exXtensible Catalog)
Putting it all together

eXtensible Catalog as a framework for Discovery, Delivery & Management

- Drupal-Module based
- Have had several discussions with XC team
- Saw Demo of the User Interface
  - Looks a lot like VUFind
  - SOLR
- Flexibility with out programming
User Interface – future directions

- VUFind
- eXtensible Catalog
- Other?
PALS Possible Future Solutions - ILS

- Next Gen Library System
- URM
  - Subscription based ASP model announced
  - No large upfront SW License Fee
  - URM-wide Shared Bibliographic file
  - Competing with OCLC?
- Evergreen
- OLE
- OCLC
PALS Possible Future Solutions

- Work with Consortium Futures Committee
PALS Solutions Suite

- ILS Support – Aleph, Evergreen
- Discovery Tool - MnPALS Plus
- Remote Access to Databases - EZproxy
- OpenURL Linking - PALSconnect Linker
- E-Resource Management - PALSconnect ERM
Communications and Marketing

- New Brochures for Linker ERM, Evergreen
- Presentations at library conferences
  - MLA, SDLA, ILA, NDLA
  - MnLink UG
- New Drupal-Based Web Site under development

Strategic Plan Goals

- Maintain Excellent Customer Service
- Continued Support of Aleph
- Financial Sustainability
- Expand Product Suite (beyond ILS)
- Expand Customer Base
- Collaborate with customers, vendors, campuses (& Open Source Communities)
- Culture of Innovation, Creativity and Exploration
PALS: Reclaiming our Heritage

- Preparing for the Future
- Building and Supporting Tools for people
- Information Access and Management
- Expanding Service
  - Beyond the ILS
  - To New Customers
  - Using Commercial and Open Source Software