

The University of the State Of New York
THE STATE EDUCATION DEPARTMENT
Central Services
District Organization and BOCES Unit

BOCES Delaware-Chenango-Madison-Otsego
CO-SER ATTACHMENT B
SERVICE PLAN

School Year: 2005-06 Activity Code: 6320 Program Serial No.: 516

Title: Library Automation and Database Service CoSer

Description of Service To Be Provided by BOCES:

The BOCES will provide coordination, professional consultation and technical assistance to implement and support an open source library automation service for our region in addition to maintaining and supporting the Mandarin Library Automation service currently used by many districts. The service will provide for training of component school staff, conversion of records to machine-readable format (MARC), expansion of the existing database, technical support to participating school libraries as well as access to the union catalog.

Service Plan

A. Needs which the service will meet:

COSER 6320: Library Automation Services Amendment

The DCMO BOCES School Library System seeks to provide a comprehensive, integrated library automation program for component districts that will provide teachers, students, and library professionals current, equitable, reliable access to information and enhance the New York State Learning Standards.

DCMO BOCES School Library System has coordinated the retrospective conversion of component library media centers since 1986. Mandarin Library Automation has been the standard library automation system supported by our BOCES SLS since 1996. Although Mandarin served our need for an automated catalog for the past seven years, serious company changes in direction and personnel has caused the School Library System Council to seriously consider alternative choices for library automation. There is a need for a cost effective, stable library solution for library media centers.

B. Planning Process for Development of Service:

The School Library System Plan of Service 2001-06 has been approved by the State Education Department. This COSER is consistent with the aforementioned Plan of Service and has the full support of the School Library System Council. In 2004-05, our BOCES SLS conducted a successful pilot using open source library automation software, (OPALS-NA – Open Source Automated Library System - North America – North America) with Delhi Central School District. During the pilot the system required no additional licenses or vendor supported upgrades to system software and hardware in the library media centers. DCMO BOCES School Library System contracted with Media Flex, Inc. to provide programming and DCMO BOCES School Library System provided storage of data on a Linux server for the pilot. Three of the four library media centers in Delhi were automated from Mandarin to OPALS-NA. This saved the district from purchasing the more expensive Mandarin Library Automation software for the Middle School Library. The development of OPALS-NA (Open Source Automated Library System - North America) has expanded to include the Knowledge Suite. The Knowledge Suite allows metasearching of the library catalog and other components built into the software such as CERF (Curriculum and Education Resource Finder), Encompass, WebQuest, Lesson Planner, eLearning and more. These tools allow for searching of curriculum specific materials on the Internet that are linked to the New York State Standards as well as the American Association of School Librarians Information Literacy Standards.

Offering an integrated system to our component schools is cost effective and offers enhancements to the library catalog. Currently, users need to go to numerous places for information in databases and on the Internet. This system offers seamless searching obviating the need for using an array of different programs to obtain information. The system reduces the amount of time not only in searching for information but also saves time on the part of the librarian and district technicians to maintain the system.

OPALS-NA (Open Source Automated Library System - North America) is z39.50 compliant (Library of Congress standard for networking diverse bibliographic records) at the building level to help qualify users for the NOVEL-ready Library Leader Level status recognized by the New York State Library. OPALS-NA will reside on a central Linux server at DCMO BOCES and will be maintained by our Library Automation Computer Technician.

The DCMO BOCES School Library System will receive network services (currently via a T1 line) through the Broome-Tioga RIC.

The SLS Director and/or the Director's representative have met with SLS Council Representatives, Library Automation participants, DCMO BOCES Technical Services team, network support staff in the component school districts, The Broome-Tioga RIC, School Library System Directors from BOCES/Big 5 Cities and other interested parties across the state to plan and inform our efforts to build a quality, integrated library automation service. Due to the fact that the database programs used by the SLS is

consonant with the regional long-range automation plan under a previously approved co-ser, the Director did not meet with the 3Rs, however the automation co-ser coordinates with the 3Rs automation plan.

It is the intention of the DCMO BOCES School Library System to provide service and support to both Mandarin Library Automation and OPALS-NA until it does not become feasible to do so. The determination will be based on but not limited to company viability, adequate bandwidth and cost.

C. Measurable Goals and Objective of the Service:

GOALS	ACTIVITIES
School Library System will continue to provide a current database of the system's union catalog of print and nonprint resources.	DCMO BOCES SLS will input holdings of new acquisitions by member libraries into the central database. Deletions of weeded resources or lost materials from member library catalogs will be processed in a timely manner.
School Library System will coordinate the interlibrary loan of resources in a timely fashion.	The ILL tool within the SCOOOLS (South Central Organization of School Library Systems) Regional Catalog will be used to process interlibrary loan requests within the DCMO BOCES SLS and between the other BOCES in the South Central Region.
School Library System will facilitate the implementation of automated circulation/cataloging systems in member school libraries.	Provide training and support for Mandarin Library Automation software and ZOPALS-NA (Open Source Automated Library System - North America) The central union catalog for the School Library System will be used as the database for the circulation/catalog system.

D. Evaluation Measures to Determine Achievement of Goals and Objectives:

All DCMO BOCES component school library media centers will be automated on systems compatible within the framework of their local districts, compliant with the Commissioner's Regulations 90.18 and consistent with the current DCMO BOCES School Library System Five Year Plan of Service as approved by NYSED/NYSL.

The DCMO BOCES School Library System Plan of Service in conjunction with the State Education Department requires the following evaluative procedures.

- All programs and services of the School Library System are evaluated at least on an annual basis.
- School Library System will collect annual surveys of system services from participating school library media specialists.
- School Library System collects ILL statistics from each member library and reports the statistics to NYSL/DLD and district superintendents.
- An annual report is sent to the State Education Department.

Technology and resource sharing are addressed in each of the aforementioned evaluative tools. Measurement will be both qualitative (anecdotal) and quantitative. Additional evaluation will be conducted as appropriate by the BOCES staff and/or School Library System Council.

Participants in the CO-SER for library automation will have the opportunity to evaluate purchased services through the annual survey of system programs and services. Feedback may also be provided through consultative visits, telephone conversions, fax and email to School Library System staff.

E. Role of BOCES Staff in Providing Service - Describe Specific Tasks/Act.

Services to be provided by BOCES SLS Staff:

1. Coordination of meetings and communications of DCMO BOCES School Library System Council, BOCES Technology Department, Library Automation participants, district technology personnel, administrators, and component library personnel.
2. Coordinate the conversion of bibliographic records to full USMARC format contracting with a reputable vendor.
3. Conversions from other library automation systems to Mandarin or OPALS-NA as the member districts choose.
4. Coordinate the transfer of patron data from school districts' administration systems to central server database or district level server database in the case of Mandarin.
5. Train district member library staff in the use of Mandarin or OPALS-NA as appropriate.
6. Adhere to guidelines and procedures for Interlibrary Loan set forth on the Plan of Service and Commissioner Regulation 90.18.
7. Coordinate and install upgrades to Linux and Window software as necessary.
8. Records will be contributed to the system union catalog and the regional union catalog of seven BOCES School Library Systems (SCOOLS – South Central Organization of School Library Systems).

F. **Stipends and Substitues:** N/A

G. **Consultant Expenses:** N/A

H. **Base Service and Additional Service:** (See also chart that follows)

The Base Service consists of two phases.

Phase I

The purpose of library automation is to provide students and teachers with location information for books, magazines and AV materials, which are vital to completion of their curriculum requirements. Upon completion of the database conversion, students, teachers are able to access their district catalog via the OPAC (on-line public access catalog) through the network to the server. This search capability provides students with the necessary skills to analyze and choose information as well as with the opportunity to locate materials quickly and easily.

Under Phase I, BOCES provides the professional, technical and clerical support for conversion of records to MARC format for school libraries that request the service. Records to be converted are those resources that have been thoroughly weeded by the school librarians and deemed valuable to the curriculum regardless of data and all new acquisitions purchased each year thereafter. All record conversions will be coordinated through the School Library System office. A reputable vendor, to supply full MARC bibliographic records, will be contracted to do the conversions. Each school district provides BOCES with shelf list cards or magnetic media for the conversion process. Phase I will continue as long as necessary.

Phase II

Phase II will overlap portions of Phase I due to the various stages of development of each school district in the retrospective conversions and library automation process.

The primary role of the BOCES School Library System in Phase II is to purchase equipment necessary to allow student/teacher access to materials, and to provide or arrange for the professional and technical assistance in designing a library automation system that will meet the needs of local school districts, and meet the mandates of the Commissioners' Regulations.

The School Library System, working with its own technical support staff, the Regional Information Center, and outside networking specialists when none are available through the BOCES or the RIC, negotiates pricing and license agreements needed for a library automation system and provides or arranges for the professional and technical assistance needed to determine specific software configurations to meet local needs.

The School Library System, working with its own technical support staff and the Regional Information Center, provides necessary technical assistance to install the computer hardware and the networks in each building.

The BOCES technical support staff and/or the Regional Information Center provide for the professional and technical support needed in the initial set-up of the hardware and software and for overseeing the testing of all software. BOCES will provide or contract for the training needed to use the library automation system and to operate the network.

BOCES will contract with the vendor of the library automation system Mandarin Library Automation, Inc. or Media Flex (OPALS-NA) to arrange for the transfer of the full MARC records from the database to the local automation system. The School Library System may coordinate the barcoding of resources.

BOCES will purchase all hardware, supplies, and software for participating schools. The server will be large enough to accommodate future growth of the database. The number of students using the workstations will determine the number of terminals. In the case of OPALS-NA, DCMO BOCES School Library System will host and maintain a Linux server, which will be used to store the Union Catalog and the catalogs of the participating School Library Media Centers.

Additional services and equipment will be available to districts on an "as needed" basis. These services may include but not limited to patron and material barcodes, software enhancements such as MARC Magician, hardware and peripherals.

I. Describe Cost Basis for Service: Districts pay for the service as a flat fee per building library. The cost of phase one will be approximately 64% of the base fee.

The flat fee covers salary and benefits for staff, which includes a library automation computer technician, training, license maintenance, and C.E.R.F database for the first year of OPALS-NA participation.

Other services and equipment are additional fees incurred by the districts as needed.