

Making it easier to specify systems

By Ken Chad & Juliet Leeves. December 2010

A new service for developing specifications for library systems takes an open 'wiki' approach to allow for comment and discussion. Ken Chad & Juliet Leeves explain why it has been set up.

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We (Ken Chad Consulting Ltd, in association with Juliet Leeves) have made the United Kingdom Core Specification (UKCS) the cornerstone of a new 'LibTechRFP' service¹ for the development of standard and open specifications for library systems. Alongside the UKCS, there is already a specification to cover the new area of vertical search/discovery services and we are looking at opportunities to get specifications for other systems such as Electronic Resource Management and RFID.

It is anticipated that this enhanced service will help to reduce costs in library technology procurement. Another aim is that it will encourage

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an open dialogue among all interested stakeholders to help develop the functionality of library related systems.

A standardised approach

The UKCS was developed by Juliet Leeves, a library systems consultant, to reduce the effort involved in specifying basic functionality which is available on all library management systems (LMSs). It was launched in

2005 and has been used by a wide variety of libraries including public, academic and special libraries, in formal and less formal procurement procedures. Juliet Leeves has been

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considering its future and she has been working with Ken Chad Consulting to maintain what will continue to be a valuable service to the library community.

The UKCS was developed in consultation with a number of LMS vendors who agreed a core set of requirements, together with a variant set to meet the needs of differing market sectors. The model agreed with vendors for the UKCS was a checklist of basic functions which could be expected on any LMS. It can be used to form one part of an operational requirement in formal tender procedures, or as a simple checklist of features.

The UKCS consists of a checklist of over 500 requirements covering bibliographic database management, Opac and end user services, circulation control, acquisitions, serials control, inter-library loans and management information. Libraries are able to indicate the importance of each requirement, but do not change the numbering or text of requirements –

¹ <http://libtechrfp.wikispaces.com/>

allowing for vendors to set up a standard response to the UKCS. This standardised approach significantly reduces time and effort for all involved in the procurement process.

The UKCS frees libraries to focus on newer aspects of functionality, safe in the knowledge that the core LMS functionality is covered. This is particularly relevant in today's market, where virtually all libraries require a range of additional software for aspects such as resource discovery, electronic resource management, digital records management and RFID.

The wiki approach

A wiki platform became the obvious choice for hosting the UKCS, offering

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as it does a number of new opportunities for the library community. Back in 1999, David Weinberger's marketing book 'The Cluetrain Manifesto'² promoted the idea that markets are 'conversations' and this still rings true more than a decade later. 'Through the Internet, people are discovering and inventing new ways to share relevant knowledge with blinding speed. As a direct result, markets are getting smarter'.

Perhaps then we can enhance the quality of the technology 'conversation' in the library domain. We believe that being smarter will take, at least some of, the cost and friction out of the market and make it

easier for everyone. Moreover we hope that everyone can benefit from this open and inclusive approach, not least in having the content freely available for re-use. For example as well as being online, the UKCS Version 3 (2007) is also available to download from the site under a Creative Commons licence.

The underlying wiki technology (Wikispaces) is very easy and inexpensive to set up and maintain. We chose Wikispaces too because, after some serious evaluation, we judged it easier to maintain and edit than alternatives such as MediaWiki (the platform for Wikipedia).

We know the proportion of active contributions will be small. That is a fact of Web 2.0 life. Jacob Nielsen's '90-9-1 Rule' for large scale online communities and social networks states that 90 per cent of users are 'lurkers', nine per cent of users contribute intermittently and only 1 per cent of users are heavy contributors. With this in mind we don't want to make the task of contributors harder than absolutely necessary.

Ken Chad Consulting has expertise and considerable experience in running wikis for particular library projects and

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also public websites such as Local Government Library Technology (LGLibTech)³ and the Society of College National and University

² <http://www.cluetrain.com/>

³ <http://lglibtech.wikispaces.com/>

Libraries' Higher Education Library Technology (HELibTech)⁴ service. The 'wikimaster' facilitates and aims to keep up the momentum. It's most certainly not about control. We haven't had a single case of spamming or abuse (though of course we have tools to deal with them). We also know that sometimes it takes time for resources to get embedded in the community's consciousness. The wikimaster therefore has an important sustaining role.

The wiki is open to all and anyone can edit and contribute to discussions, thus providing a means of keeping it up-to date. Furthermore, whilst the specifications on the wiki have been developed specifically for the UK market, there has been considerable interest from other countries, and the wiki could be used to develop country-specific subsets.

Other opportunities

We hope too that the wiki approach will open up other opportunities. Interest has already been shown in matching the functionality offered by open source LMSs against the UKCS. All stakeholders, including librarians and vendors will be able to contribute much more easily to the development of specifications by including newer functionality.

This is a flexible and open community resource that can develop in a variety of directions

⁴ <http://helibtech.com/>

Accessing and using the specifications

The UKCS can be downloaded from <http://libtechrfp.wikispaces.com/> as a Word document. This document includes advice about how the UKCS can be used in a procurement process for a library management system.

In addition the UKCS and the vertical search specification are available online. The online versions form the basis of specifications that can be altered to meet changing needs. There is a 'discussion' tab that allows anyone to comment and suggest changes. Changes can also be made directly online using the simple editing features of the wiki. Users simply need to sign up to the wiki with a valid email address

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