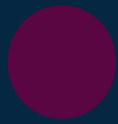


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How to choose

Library Management Software

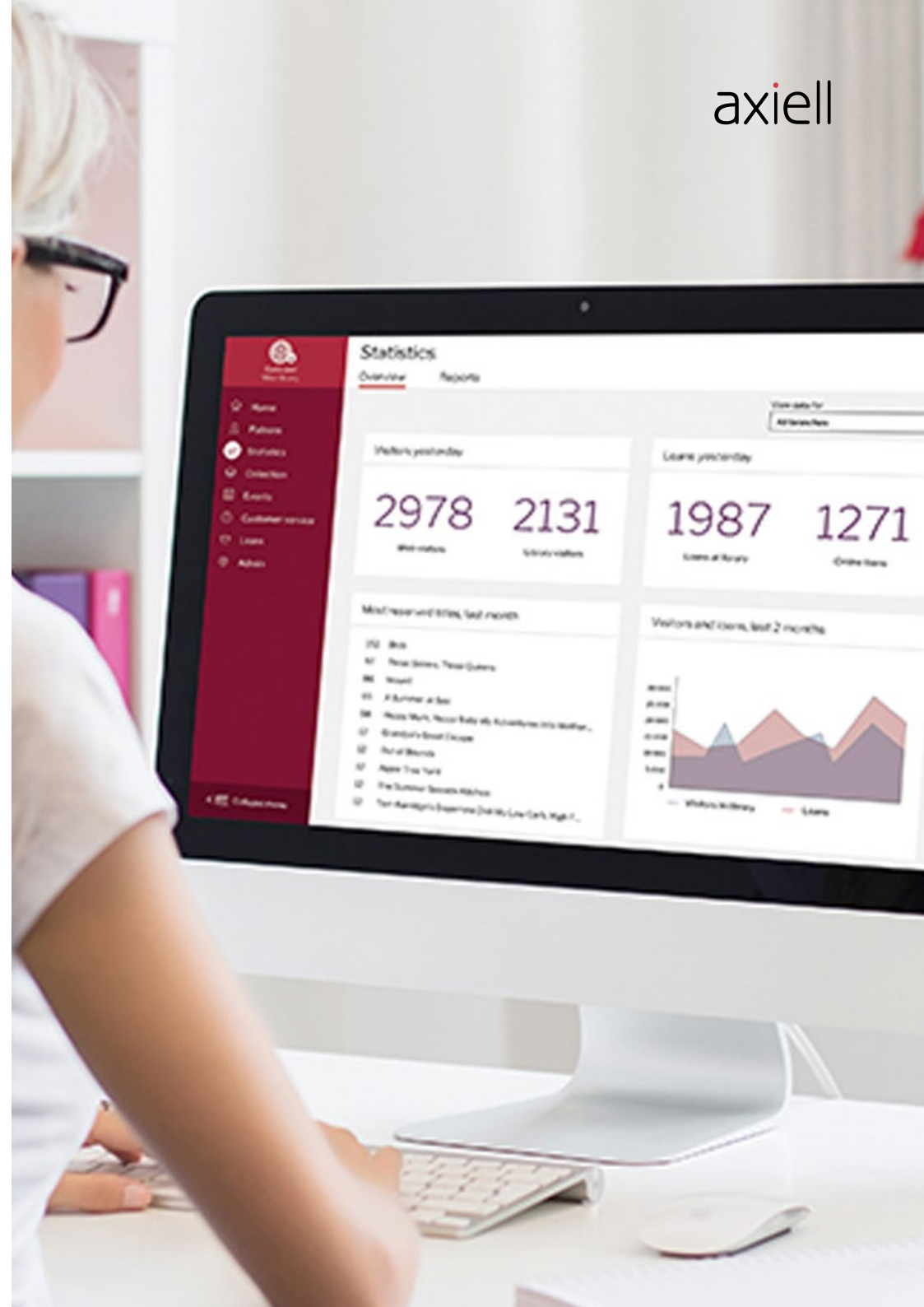
A guide for public libraries: Finding the right software to help you manage your library and serve your patrons





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1. Understand your needs

Library management technology can be complex – it can do a world of amazing things to help you manage your collections. Looking at systems before setting your objectives opens you up to being wowed by a world of functionality that you might never use.

Library management software is designed to support your library and help you achieve your goals. The technology shouldn't drive your decisions. Systems are an enabler to your mission – so before you start, take the time to really determine WHAT you're trying to achieve, and WHY you're investing in a system.

Before setting your objectives, take some time to really understand what you need.





Understanding your needs

Identify the most relevant industry standards:

Look at your national and local government guidelines and identify if any of your funding or library accreditation is dependent on you adhering to any specific standards.. You don't need your system to meet every standard – just the ones that matter to your library.

Align with your institutions' strategic plans:

Speak to senior organisation leaders about the priorities for the next 3-5 years, or if you have a written strategy – read through it. Make note of any key outputs or objectives that might impact what you need from your library software.

Don't do it alone:

Build a project team and assess your objectives together. If you're a large team - speak to a range of people who will use the system, or anyone who will likely benefit from receiving reports and data from the system. If you're a small team – gather everyone's views before narrowing down and prioritising.

Think of the different types of users:

Think about who will be using the software over the next 5+ years. Will only trained Library staff be accessing the system? Or are you likely to utilise volunteers or temporary staff? What about your audiences who access collections information through websites and onsite – what are their needs?





Understanding your needs

Get IT involved early:

Find out if your organisation has any particular IT or infrastructure policies or infrastructure needs that must be met from the outset.

Think of other technology and how it suits:

Identify if you or other departments have other critical systems which will (or should) interact with the software. Will integrations be required, and if so in what way?

Understand your buying process:

This is a good time to take stock of if your organisation has a specific procurement process and if so – what it is and how it may affect how you approach this project. Think about who has buying and sign off power and get them involved from the start.

What procurement route is available to you?

Will you be looking to go for a full tender process or could you consider using a framework such as G-Cloud?

Get an idea of your budget:

You might learn more as you get your first initial quotes, but try and get a rough price range.





2. Set clear goals

Before you start the tender process or start speaking to suppliers – make sure that you and your colleagues have agreed clear, shared goals. A bit of time up front on this will save you a significant amount of time during tender response evaluation, supplier calls, during demos and during discussion and comparison later.

When you have taken the time to fully understand your needs, try and set some clear objectives for what you want to achieve in implementing new library software. These goals should not be about what features you want your system to have – rather they should be about what the system will help you and your team achieve.

Aim for 3-5 SMART goals that the decision makers all agree on.

- Specific** (simple, sensible, significant).
- Measurable** (meaningful, motivating).
- Achievable** (agreed, attainable).
- Relevant** (reasonable, realistic and resourced, results-based).
- Time bound** (time-based, time limited, time/cost limited, timely, time-sensitive). – This is likely your overall delivery date for the project.

Examples

Intention: Increase online engagement

SMART Goal: Audiences can browse and search our library online through our website, reserve physical books and borrow e-books online

Intention: Increase patron services on site

SMART Goal: Must allow integration to self-service services within the library allowing check in and checkout, locating books and reserving library resources

Intention: Increase accessibility of systems

SMART Goal: Software must be cloud based and accessible through a web browser on a variety of devices

Intention: Increase participation in events

SMART Goal: Event management should be available within the software and patrons can book tickets online and in the library



3. Prioritising needs: consider the whole picture

Once you have a full picture of your needs, and also a clear set of shared objectives – you can prioritise features and capability using the MoSCoW Method. Using a model like this will help you separate nice-to-haves from need-to-haves and ensure that during the buying process you can stay true to your overall objectives and priorities.

You can learn more about how Stephen McConnachie, Head of Data Collections at the BFI [used this model while sourcing new technology here](#).

Try and organise your wants or desired functions into the following categories:

MoSCoW Method

Mo Must-haves Requirements labelled as a MUST are critical for success. If even one MUST requirement is not included, the project delivery should be considered a failure.

S Should have While SHOULD requirements can be as important as MUST, they are often not as time-critical or there may be another way to satisfy the requirement, so that it can be held back to a future phase.

Co Could have Requirements labelled as COULD are desirable but not necessary. These will typically be included if time and resources permit.

W Won't have Requirements labelled as WON'T have been agreed by stakeholders as the least-critical, or not as appropriate at the time. These will usually be sacrificed unless they can be delivered without additional cost.



4. Research what's available

Once you have a clear idea of what you're trying to achieve – you can start researching what options are available to you. During this process, and the later stages you might learn new things about what is possible. It's fine to adjust or re-evaluate your MoSCoW method as you discover new information – as long as it still aligns with your overall objectives.





Research what's available

Check your existing system:

Sometimes people go out looking for a new system, when they're on an old version of their current software. Speak to your current supplier about the latest upgrade, and any enhancements planned in the roadmap and see if an upgrade path will get you what you need. If there's a particular feature you need, your supplier may be able to add this to the future roadmap.

Word of mouth:

Ask for recommendations from colleagues and peers from similar institutions – who likes the product they are using and why? It's more useful to speak to libraries of a similar size, collection type and budget to you than asking everyone you know in the industry.

Industry bodies:

Investigate recommended and accredited systems from relevant industry bodies and associations.

Online research:

Search online for different providers to find any that you may have missed.





5. Evaluate your options

Depending on your organisational process – you may evaluate suppliers based on tender responses, or something more flexible and informal. Either way you are very likely to have demonstrations of the software and gather various technical and feature information.

When you're confident that you have all the information you need – weigh up the options against the following criteria:

Goals: Check against your MoSCow model and your SMART goals

Standards: Check for the correct standards and accreditation

Users: Check it meets the needs of the users, now and in the future

Integration: Check for the ability and ease with which systems integrate

Future Proofing: Check the system has the capability to expand with your developing needs and that the vendor is still investing in new development.

Partnership: Make sure that the vendor is someone that you're happy to work with in the long term. It's not just the software but the partnership that matters.

User relationships: Don't underestimate the importance of an active user community. Connections with other users provide help, guidance and direction for product development.

3 Top tips to consider when gathering information

① Share your priorities with your suppliers up front:

if you have a clear set of goals, and have organised your requirements into a MoSCoW model then it might be worth sharing that information with the supplier before your demonstration. Then they can tailor your demo to what matters most to you and you can have a more effective discussion.

② If you can – share information with users and decision makers:

Not everyone will be able to attend every demonstration. If there is video content available – share it with your wider user pool and gather feedback and questions from people who will be using the system day to day

③ Find out how it works:

When evaluating your MUST haves and SHOULD haves – don't just ask if a piece of software can do something – ask to see HOW it does it and whether that matches your expectations.



6. Make your decision and get final sign off

Ultimately, once you have gone through the process you should have a clear idea of which software and vendor will best serve your needs and you'll be ready to make your decision.

3 Top tips when making your final decision

- ① **Don't do it alone:**
Ensure it's been thoroughly discussed with all the relevant parties and the best course for the majority taken
- ② **Be scientific:**
Evaluate your options methodically and scientifically. Ensure you're informed to the best of your ability.
- ③ **Trust your gut:**
Listen to your instincts. Paper based evaluation doesn't always show the full picture.





At Axiell we offer a range of Library management solutions to a wide range of customers, and we're confident that we can help with most organisations' collections management challenges. You're always welcome to reach out to us if you're considering deploying a new LMS.

Just reach out at sales-alm@axiell.com and we'll get back to you.