

The first Year of the new association of Users

Chair's report on 2006 IGeLU activities.

by Guido Badalamenti

1. The meeting.

I am very pleased to open this meeting that represents the conclusion of the formal merging process of the former ICAU and SMUG Users Groups and marks the beginning of the new common activities that will include the Users of all the Ex Libris products (ALEPH, Digitool, Metalib, Primo, SFX, and Verde). This new Association needs to be seen as a single strong body - one voice to communicate with Ex Libris and the other national or international organizations - but at the same time it could be seen as a gathering together of *Products or Special interest working groups*, because we would like to preserve the character of the original Associations,.

This meeting is attended by more participants than we ever had before coming from 27 Countries and representing 193 Institutions (Australia, Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Israel, Italy, Japan, Latvia, Luxemburg, Mexico, the Netherlands, Norway, Poland, Portugal, South Africa, Spain, Sweden, Switzerland, United Kingdom, USA; this bears witness to the users' interest in the Association and the contents, lectures and talks of this Meeting.

2. IGeLU foundation and future activities.

There have been many activities during the last year aimed to finalize all the procedures necessary to the formal registration of our Statute and we devoted some time to investigating the meaning of the new official bodies, their relationships and the basis of their organization. Thanks to the work done by the Steering Committee and by the volunteers of the Working Groups, some concrete proposals will be presented to the entire community for a more indepth discussion and analysis.

We now have the opportunity to revise and reconsider the meaning and role that our association needs to play in favor of the member Institutions . An important aim is to create a sense of belonging to the new Forum on the part of the users of all the Ex Libris products, safeguarding the identity and the good practices of the past.

We have a chance to take advantage of the experience that we have had with our previous associations and I hope you will agree that many results have been achieved in the past 16 years with ICAU and last 4 years with SMUG; I do hope that the outcome of these activities will be positively evaluated.

Our activities have changed a lot over the years, with regard to both content and meaning (formal/informal enhancement procedures, meeting structure, relationships with the Vendor) and formal organization (statute changes, SC structure, working group structure).

Looking back at the past, I can at least enumerate a few points that could be seen as a good heritage for the future, but I'm pretty sure that each of you could find some others as well:

1. Meetings and experience-sharing
 - We have changed the content of the meetings a lot through the years, according to the users' recommendations. Attendance at the meetings is one of the most appreciated aspects of the association activities thanks to the opportunity of participating in exciting foreseeing sessions, receiving information and attending presentations concerning new software developments . It also represents a good occasion for people to discuss future scenarios and exchange ideas for the organization of their daily work – either during panel sessions or informally during coffee breaks. The presentation of users' experiences during poster or parallel sessions is also an important chance, which we need to foster - to share valuable information . Moving the meeting from one country to another helps make our Association well known because of the higher number of participants from different countries and their surrounding areas.
2. Influence on the development of the software.
 - An important aspect of our activity – especially for the so called “more mature” software - is collecting proposals relating to both enhancement of all the software we deal with and improvement of functionalities of specific parts of the products. With regard to ALEPH, it seems important to maintain the level of formal agreement achieved over the years with Ex Libris, concerning the preservation of development policy both in terms of “point of complexity” and of partnership within the framework of focus/working groups. With regard to SFX, Metalib, Digitool it seems important to find a new approach and procedures for collecting development proposals from the users and submitting them to Ex Libris who should take on a commitment to their evaluation. Some other products, like Verde and Primo, are not in an enhancement stage yet and probably need a different approach that can in any case preserve the opportunity for users to influence development.
3. Working and strategic groups.
 - We have seen the crucial role played in the past by working and strategic groups in both influencing new developments and evaluating/testing special developments. This was the case of the new ALEPH Client interface or ILL, and the preliminary work and analysis behind the development of new software such as Verde or Primo. For the future it will be advisable to think about focus group that deals with issues with potential impact on various products and one interesting proposal that the SC would like to discuss with the users and Ex Libris is concerning a focus group on e-books.
4. Documentation centre.
 - We have seen how useful a Content management system capable of sharing documents and resources has been for the internal activities of the SC and Product Working Groups (PWG) ; we hope this opportunity will be seized by the entire community and IGeLU working group. People have often asked us to collect and present documents concerning users' developments or experiences on our portal, but we have to admit that we have not been successful in effectively implementing this except for meeting presentations.
5. Forum.
 - Unlike the above point, the goal concerning forum organization has been reached ; at least some of our discussion lists seem to be very active and

useful in the exchange of experiences. An important result of the discussion with ELUNA was our mutual agreement for maintaining the discussion lists for SFX, Metalib DigiTool and Verde at an international level. We are sure this will guarantee a more interesting opportunity for our communication.

6. National user groups .

- We believe that the National user groups could play a crucial role in the framework of this new organization of Users. Indeed the number of software and Ex Libris users is growing; , on one hand the Association would have a stronger voice to communicate with the outside world , while on the other the Vendor might pay less attention to the single Institution . A good relationship between each National user group and the Product Working Groups and the IGeLU Steering Committee - will be extremely important for each member. Many Institutions are becoming users of more than one Ex Libris product, but some of them do not have enough resources to take part directly in the activities of all the PWG. This gap could be bridged by the National user group coordination of activities.

3. Ex Libris partnership.

The partnership with Ex Libris for the enhancements and development of software represents an important aspect of IGeLU activities. On both parts there is a clear understanding of the strategic meaning of cooperation for the benefit and quality of software. The users' input guarantees an important added value in terms of adherence of the software to users' expectations. Maintaining this level of performance represents a big effort and investment made by volunteers and Institutions in terms of time and human resources . This clearly shows our strong interest in our products and our satisfaction with the cooperation we have established with Ex Libris. We are also aware that this work and organization constitute an interesting aspect that is certainly evaluated by potential Ex Libris users, who frequently contact us in order to discover the level of cooperation we have reached and to what extent we are able to represent users' influence with Ex Libris. For this reason we agreed with Ex Libris to have regular meetings to discuss changes or strategic developments in libraries in the Ex Libris product suite. We outlined a cooperation agreement to develop IGeLU products that can guarantee an open and transparent process to all Users in order to present proposals or enhancement requests for the entire suite of products, believing that all their inputs are equally considered. Actually this point is of crucial relevance for users' satisfaction. A good result of this relationship is the agreement we reached with Ex Libris, this text is available on the web site and in your meeting folder.

We still have to define some aspects of the procedure and discussion will continue during this meeting with Ex Libris, also on the basis of input that we will receive from the community of users during PWG sessions. Within this new organization the continuous process of collaboration with Ex Libris to develop individual products will be delegated to the PWG , while the overall responsibility for a well organised and effective procedure for all products will remain in the hands of the SC.

One more positive aspect of the interim SC activities during the year is that Ex Libris is now seriously considering carrying on with System Seminars, looking into the possibility of organizing the next one in Germany.

Moreover, the Steering Committee is still discussing the meaning of total cost of ownership with Ex Libris; we intend to point out the level of satisfaction of the national

user groups with respect to accuracy and the level of assistance they are receiving by Ex Libris and/or its distributors. As a first result of this discussion, you will find in the meeting folder a letter sent by the Ex Libris CEO addressing most of the users' problems. A further aspect we would like to investigate with Ex Libris is the possibility to define common procedures between users and Ex Libris for quality tests of the new releases of the softwares.

Finally we are still of defining a clear method to investigate and discover what represents the core of our programs and the pricing policy reserved to the present Ex Libris users when they decide to buy a new product.

4. IGeLU Members.

The number of IGeLU members is increasing constantly: as of August 2006 they are 210. This represents a very good result achieved in only six months, since we allowed people to formally register as Members. We are aware that for many Institutions it is quite complicated to quickly complete the procedure necessary to register for the first time in a new Association. while it would be much easier in the following years to renew their membership. Each Country and many Institutions have different rules and we got in touch with many of them in the first half of 2006, providing all the requested documentation and clarifications. We have heard that many Institutions are now at the end of their internal procedures and we are confident that the number of the IGeLU members will rapidly increase in the next few months.

5. Dissolving ICAU.

In order to implement the ICAU Assembly decision for the ICAU to be dissolved into the IGeLU and according to the lawyer's recommendations, the ICAU Steering Committee Members also decided to renew their registration to ICAU for 2006 in addition to their registration to IGeLU), in order to have the power to approve the final budget and have the remaining funds transferred by bank to the new IGeLU association. . The official ICAU Members' Assembly , composed of five Institutions, up-to-date with the 2006 membership fee, will be convened in Stockholm on Sunday September 3rd for this final fulfilment.

6. Budget.

In order to allow a detailed analysis of ICAU final budget and IgeLU draft balance sheet, tables (specifying single expenses) have been published on the IGeLU web site prior to the Meeting.

The main tables are attached to this report.

The draft IGeLU budget should be approved by the Assembly during session no. 1 (IGeLU Activities).

According to the interim Steering Committee proposal, the draft budget for the coming year includes many expenses that we deem necessary in order to support activities and some facetoface meetings of the SC and PWG, even if we think that most work will be done via e-mail or conference call.

This has to be seen as a draft budget drawn up according to prudential criteria and we haven't planned to have a balance between revenues and expenditures since at the moment an exhaustive estimation of the Association is not available.

The annual fee for 2007 will not be increased.

The budget includes the remaining ICAU funds devolved to IGeLU.

7. Documentation.

This year Duccio Di Blasi, Peter Klien, Lukas Kostner and Beate Rusch have devoted many of their energies to configuring and customizing our CMS: *Plone*. This software was evaluated as an important tool for storing documents with different levels of security and providing working groups with an easy way of sharing documents and information. Nevertheless, last July the software demonstrated an instability that never appeared before; for this reason the team who implemented Plone is seriously considering completely changing the platform.

Thanks to our editor Ragnar Helin, in cooperation with Beate Rusch we have a regular Newsletter available on the web site that represents a useful tool for quickly sharing information about the IGeLU community.

This year we have also had a new issue of SMUG4EU with a lot of interesting contributions provided by SFX and Metalib users. It has been a very informative issue that gave us the opportunity to share experiences and compare similar problems and solutions experienced in different countries; so we hope this initiative will continue within IGeLU.

Finally, on behalf of all of us, I would like to thank, , everyone who has contributed in different ways to IGeLU activities during the year, especially my colleagues in the interim Steering Committee, for the important work they have done: Gerard Bennett, Pat Busby, Betty Day, Dale Flecker, Jiri Kende, Peter Klien, Beate Rush, Marco Streefkerk.

Let me conclude by warmly thanking our Swedish colleagues who kindly offered to host our meeting; first of all the Representatives of the Swedish Film Institute who provided this beautiful location. A special thank-you also goes to Ragnar Helin (from the Library of the Swedish Parliament), who chaired the working team, and all the components of the Group: Håkan Adefjord (from the Swedish University of Agricultural Sciences Library); Lisa Kullman (from the Swedish Defence Material Administration Library); Inger Lagerros (from the Swedish Film Institute Library); Maria Nylander (from the National Institute for Working Life Library); and Christian Zeising (from the Royal Library).

On this occasion we cannot forget that Goran Skogmar would have been one of the most enthusiastic members of the Group : he liked the idea of this meeting very much.