



Determining if Open Source Is Right for You

WITH THE
LAUNCH OF
FOSS4LIB, THE
ABILITY TO
CONSIDER
OPEN SOURCE
SOFTWARE
SOLUTIONS FOR
YOUR LIBRARY
JUST GOT A BIT
EASIER.

Open source is a solution that is often thrown around these days as the answer to dwindling IT budgets and frustrations with traditional software tools that lock out access to data structures and business logic. But in today's complex environment, these are only two small considerations to make in figuring out the answer to the question, "Should my organization consider open source?" What are the benefits and the drawbacks? Finding a balanced solution can be tricky when considering open source, so it's important that you weigh all your options and, even more importantly, make sure you don't leave out any questions.

If you or your library is new to considering open source, then FOSS4LIB (free open source software for libraries) is definitely for you. Recently launched by LYRISIS, the website service provides a suite of planning and decision support tools and hosts a registry of open source software solutions available for use by libraries.

The Big If

Deciding whether or not open source is the right strategy and approach for your organization is a major decision. Helping libraries respond to the "if" question is a large focus of the FOSS4LIB website. Decision support tools are grouped into categories that help librarians do the following:

- Determine how their library's IT support structure and philosophies may be aligned to the elements of desired control and responsibility
- Work with IT departments, especially external ones such as city government IT or contract service providers, to determine if they are open and able to easily support open source tools
- Guide the final open source software selection process

Control vs. Responsibility

Determining your library's organizational readiness and ability to adapt and support open source software solutions is the focus of FOSS4LIB's Control vs. Responsibility matrix building tool. By responding to a series of 40 short questions, librarians can be guided by the interactive tool in determining where their organization's current inclinations fall when considering vendor and open source solutions in either a self-hosted or SaaS (software as a service) environment.

Through a series of questions, the Control vs. Responsibility survey tool helps libraries assess at a granular level how their organization's current environment and culture influences the organization's ability to potentially benefit from open source. The tool helps



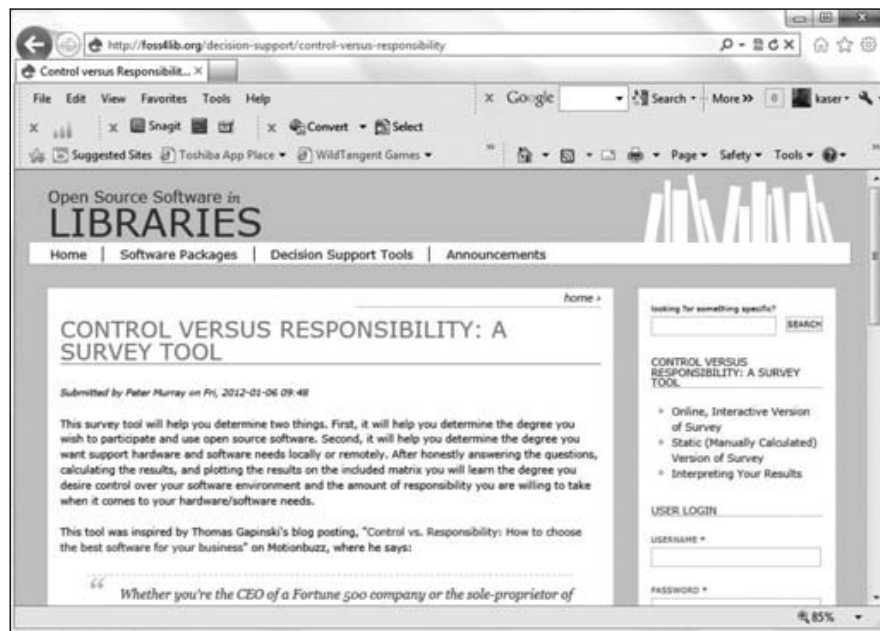
its users evaluate the trade-offs between gaining full “control” to open data, software code, and business logic with the concerns about taking on the ongoing responsibility for the development, implementation, and support of the software solution.

Having a good understanding of where your organization currently falls on this matrix is fundamental in helping you not only to understand how ready your library is to consider open source solutions, but also to determine which path might be best for you to consider if you do decide to go open source. The question isn’t just “open source or not open source.” With so many of the options available today based on cloud computing and SaaS solutions, the considerations around “responsibility” becomes even more important as you consider hosted and cloud-based services versus in-house hosted and support solutions.

Working With IT Departments

When working with IT departments—both internal and external—while considering open source software solutions, it is important to understand both the environment that your IT department is dealing with and the strategies it is working with to support your library and keep services moving forward. The importance of engaging IT staff becomes even more imperative when your library does not have its own IT resources on staff. When IT resources are in-house, it’s much easier to consider the impact that an open source solution may have on the organization. But when your library’s IT support is maintained by a parent organization, such as a campus or city government IT department, it helps to understand the department’s current environment, strategies, and abilities, especially those related to the open source solution you may be considering.

A hosted open source solution with an external provider will have a much



One of many decision-making tools now available to libraries considering open source solutions

different impact on an IT department than an internally hosted one. If the solution platform is already supported by the current IT environment (for example the IT department already supports several software solutions in the Linux environment), then adoption may not be a huge issue since expertise already exists on staff. Determining who has access to software and servers as well as enterprise security is always a huge consideration for IT staff as well. When the solution platform is SaaS- or cloud-based, the impacts to IT and support can be diminished. But additional factors can also have an impact, such as remote authentication and integration with other internally hosted services.

When considering open source software you also need to make sure that your evaluation process documents the support impacts to IT and that technology expertise is integral to your selection process. Although it should be common sense that IT management should be consulted and, even more importantly, be key members of the decision team, when considering open source solutions, it’s

amazing how often I hear that an organization simply chooses to overlook the IT department. This creates an adversarial relationship rather than a collaborative one. Open source by its nature and philosophy is collaborative, not proprietary. Hence the importance of working closely with your IT staff to ensure that all impacts and opportunities are considered.

Considering Open Source Costs

Although one of the huge benefits to open source software solutions is that there are no initial software or licensing costs, open source is never truly “free.” There are always costs associated with the implementation and support of any software solution. When evaluating open source, especially against vendor solutions, it’s important to understand the “true costs” associated with open source so you have a full understanding of the impact to operational and other startup costs (such as custom development work).

One of the nice decision support tools on the FOSS4LIB site is a spreadsheet

that outlines a multitude of costs that you should take into consideration when evaluating open source (or any other software solution, for that matter). Acquisitions and deployment costs are important startup costs to take into consideration. Is there any new hardware or servers that you'll need to purchase to support the open source software? Will it require additional bandwidth? Will the software need to be customized in order to implement the solution? The costs associated with these and other issues need to be considered.

Open source software adoption might also have hidden support and staffing costs. Does the skill set to support the software already exist in-house? If not, what are the costs associated with hiring new staff or training existing staff? How much staff time is estimated monthly for support, testing, and maintenance upgrades to the software? What impact does supporting the new software service have on existing operational costs? Considering the responses to these questions will not only help you understand the financial impacts of open source solutions, but they can also help you determine ROI (return on investment) and develop the business case, if you need it, for considering open source in either a self-hosted or SaaS environment.

Selecting Open Source Software

Once you've determined that open source is the solution that your organization "can" and "should" consider, you'll need a process that helps you evaluate the open source options available. This is where the software selection guide on the FOSS4LIB site can be very helpful.

Selecting the right open source solution can be difficult, especially when you are faced with a multitude of options. Comparing the benefits of open source solutions is seldom easy, since software providers rarely provide all

the information you would need to make an apples-to-apples comparison. Besides, if a given package is missing a piece of functionality you need, you can always consider an open source customization. These evaluations have a way of becoming complex.

IT IS ALSO IMPERATIVE TO CONSIDER THE EXTERNAL SUPPORT OF OPEN SOURCE.

The FOSS4LIB Software Selection Methodology (SMM) provides a process that aims to address four main goals:

- Define and clarify the business needs and software requirements
- Create a suitable short list of options
- Analyze and evaluate the best solution from the shortlist
- Justify and create organizational buy-in for the solution

Since an RFP is seldom a tool used in an open source selection process (unless it's an RFP for vendor implementation and support of an open source software solution), you need to rely on methodology that helps you evaluate organizational impacts as well as functional needs and requirements. Following the SMM process helps you move through the evaluation process and create organizational support for open source. But just as important as the internal support from your organization, it is also imperative to consider the external support of open source.

The robustness and vigor of a healthy developer network and open source community should be a strong consideration

of your selection process, especially if you do not have a lot of programming resources to rely on. Are there lots of developers actively working in an open source solution? Is there a good network of solution providers you can tap into for customization work? Is there a governance body to ensure software stability and oversee new releases? These are just some of the questions that can be addressed in the software packages registry on the FOSS4LIB website.

Currently, more than 50 entries for open source solutions in use by libraries have been populated in the website's registry along with information about the solutions, including releases, providers, technology specifications, developer networks, and cross open source solutions associations. With the website just launched in January, the registry is accessible (email registration required) for anyone associated with the software—from providers with new features information to librarians with firsthand knowledge and implementation examples—to add to the knowledge of the registry.

As more and more libraries consider and implement open source software, there's no doubt that the usefulness of this registry will continue to grow. But one thing's for sure: With the launch of FOSS4LIB, the ability to consider open source software solutions for your library just got a bit easier, thanks to this great set of decision support tools. ■

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