



### **CCLS Information Technology Services Policy**

Approved 12/10/14 by the CCLS Board of Trustees

The Chautauqua-Cattaraugus Library System (CCLS) is committed to providing its Member Libraries with high-quality, affordable Information Technology (IT) assistance. Effective and reliable hardware and software is necessary to meeting computing and internet needs of our community members. CCLS recognizes that IT issues are a central concern of our Member Libraries and that there is a need for assistance.

IT assistance should be prioritized as fairly as possible, while focusing attention where the need is the greatest. Prioritizing member library projects should be enacted in such a way as to provide incentive for standardized purchasing, for libraries to use CCLS IT staff for installation of new hardware and software, and for libraries to follow recommended IT best-practices.

It is the intention of CCLS to provide most or all IT services to Member Libraries at low or no cost. However, if it is evident that demand for IT services is greater than the ability of CCLS to meet that demand, CCLS reserves the right to create a fee structure to help expand those resources and make distribution of IT services fair. Any revenue from a fees structure should be reinvested into IT services.

CCLS may purchase equipment on behalf of Member Libraries and bill for reimbursement only with prior approval of both the CCLS Director and that Member Library Director.

## CCLS Guidelines for Provision of IT Assistance to Member Libraries

### Guiding Principles

- Provide high quality IT assistance to Member Libraries that do not have IT staff and cannot afford to pay the high costs of an IT consultant;
- Reduce the number of hours spent on future repairs by incentivizing the purchase of high quality equipment;
- Encourage the use of CCLS IT for installation of new equipment to make future problems less frequent and easier to repair;
- Where possible and worthwhile, centralize solutions to commonly-shared IT problems;
- Develop a centralized inventory of Member Library computers for a better understanding of each library's needs and the state of System IT as a whole;
- Develop and make available a knowledge bank of past questions and answers so that each library is not having to reinvent the wheel;
- Recognizing that CCLS cannot provide for all needs of every member library, find ways to prioritize projects and assist libraries in a fair, equitable, and efficient manner;
- Recognizing the complex and unpredictable nature of IT services, CCLS will strive to maintain communication and keep Member Libraries updated of any changes.

### Prioritizing Assistance

IT service tickets will be prioritized as fairly as possible, using the following as a guide:

Top priority will be given to situations involving:

- Emergencies in which Computer and/or Internet services to patrons have unexpectedly stopped due to hardware or software failure;
- Hardware and software owned by CCLS, on loan to a Member Library;
- Hardware or Software that can be fixed remotely;
- Projects with a specific and important deadline (requires approval of the Director).

Second priority, serviced in order in which they are received, will be given to requests involving:

- Equipment and software acquired and/or installed with the assistance of the CCLS IT staff, in libraries making a demonstrable effort to implement recommended best practices and have responded to requests from CCLS IT staff for information in a timely manner.

Third Priority will be given to equipment and software not fitting any of the above categories, purchased prior to the implementation of this policy.

Fourth Priority will be given to requested assistance involving hardware and software made against CCLS recommendation or without recommendation after the implementation of this policy. Such assistance may be refused by the CCLS IT Manager.

CCLS staff reserve the right to work on lower priority projects at libraries in close proximity to high priority projects in order to reduce traveling time.

## **Communication and Estimated Completion Dates**

IT assistance requests will be tracked through Helpdesk “tickets.” Library staff and trustees may create a ticket themselves, or they may email the IT Manager, who will create a ticket on their behalf. After a ticket is created, all following activity and estimated completion dates will be tracked through the ticket system.

Every effort will be made by CCLS IT staff to communicate and changes to estimated completion dates. If a Member Library has a specific deadline that must be met, it is the library’s responsibility to clearly communicate that date and the importance of meeting that deadline clearly with CCLS IT staff. The CCLS Director will approve “fast-tracking” of projects if there is a specific and important reason.

## **Purchase Approvals**

Purchases of software and hardware through CCLS (ie. purchased by CCLS and then billed to the Member Library) must be approved by the Director/Manager of the Member Library. As Officer in charge of operations, the decision of the Director/Manager will be considered above that of a Trustee or staff member. All purchases on the behalf of Member Libraries require approval by the CCLS Director and the Member Library Director.

## **Hardware and Software Recommendations**

CCLS IT staff will maintain an up to date list of recommended hardware and software for common library functions. Development of this list will be based on price (including group-buy opportunities), effectiveness, long term dependability, warranties, ease of maintenance, etc. IT staff will also send occasional recommendations of best practices regarding IT procedures and practices of common library functions. Library that follow recommendations will be given priority assistance. Equipment and software purchased on the recommendation of CCLS IT staff, and installed by CCLS IT staff, will be given priority service.

## **Inventory**

CCLS IT staff will conduct an initial IT inventory for each Member Library, through a combination of online survey and site visits, as appropriate. In the future, Member Libraries will be asked to keep IT staff updated on additions and disposals. The purpose of the inventory is: to gain a broad understanding of the System’s IT health and where attention is most needed; and, to give IT staff a quick-view snapshot of a Member Library’s IT situation when specific problems and opportunities arise.

## **Fees for IT Services**

CCLS reserves the right to create a fee structure to help expand those resources and make distribution of IT services fair. Prior to the establishment of a fee structure, IT staff shall carefully collect data demonstrating the need. The guiding principles of any fee structure are as follows:

- Fees should be reinvested into IT services for Member Libraries;
- The fee structure should recognize that many Member Libraries can afford only very small fees, or none at all, and should ensure the libraries with smaller means can afford basic services;
- The fee structure should encourage use of CCLS IT services for the libraries that need it most, which discouraging abuse of the service;

- The fee structure should have a sliding scale that increase fees for libraries that use the service most often;
- CCLS will strive to create a fair fee structure that gives equal access to System IT Services for all libraries;
- Member Libraries should not be caught off guard by fees; they should approve any associated fees being charged in advance of work being done;
- The fee structure should be re-evaluated with Member Library input every year, and any changes should be communicated fully and clearly to all Member Libraries
- The fee structure should incentivize Member Libraries to use best practices, to take CCLS recommendations when purchasing hardware and software, to use IT staff for installation and setup of hardware and software, and to respond to requests for information from CCLS IT staff.

### **Long Range Goals**

- Member Libraries will have effective and reliable hardware and software to consistently meet their community's computing and internet needs;
- CCLS will identify and implement efficient centralized solutions to commonly held IT issues;
- Member Libraries will feel like technology is more of an opportunity to better serve their communities and less like a stressful and time consuming burden;
- Member Libraries will be in a better position to help themselves with IT issues without relying on CCLS IT staff;
- CCLS IT staff will be able to solve more IT problems remotely without having to make site visits;
- CCLS staff will spend more time on proactive projects that improve quality of life in our service area, and less time dealing with failing equipment;
- Member Libraries will feel turn to IT staff for recommendations and assistance with hardware and software purchases, before trying to find solutions on their own.

### **Grievance Procedures**

In the event a Member Library does not agree with the way a ticket was handled by CCLS IT staff, due to prioritization or other issues, the Member Library Director/Manager should first bring the disagreement to the attention of the CCLS IT staff person assigned to that ticket. If an agreement still cannot be reached, a grievance should be formally submitted to the CCLS Director, who will have the final decision on how to proceed.