Collaboration at the Core of Change:

Lake Forest College & Kalamazoo College
Commonalities between LFC and K

- Small schools with small endowments
- Merged organizations with similar philosophies
- Libraries in Oberlin Group
- Jenzabar (ERP) schools
- Both working on new library building projects at time
- Both struggling with small staff size and inadequate budgets
- MITC/NITLE members
What We Are Not
Getting to Where We Wished to Be

- Executive level discussion at LFC
  - Improve IT services
  - Add staff expertise
- Temporarily fund through grant?
- Conclusion: collaborative approach best chance of grant support
- Contacted Kalamazoo
- They said yes (the fools)
- Applied to Mellon - received $200,000 grant for collaboration
Both Colleges were undertaking major library renovations during collaboration.

Donnelly and Lee Library
Lake Forest College
May 2003 – September 2004

Upjohn Library Commons
Kalamazoo College
June 2004 – December 2005
Morphing of The Concept

- Idea changes through further discussions (or, just what is it we really need, anyway?)

- Difficult to find the ideal candidate

- NITLE Conference in Lisle, IL provided more fodder for this crazy idea
Using IT for Competitive Advantage

Diagram 1: Productivity and Innovation

<table>
<thead>
<tr>
<th>Competitive Gain for Institution</th>
<th>Productivity</th>
<th>Innovation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Few Technology Users</td>
<td>III</td>
<td>IV</td>
</tr>
<tr>
<td>Impact</td>
<td>I</td>
<td>II</td>
</tr>
<tr>
<td>Using IT for Competitive Advantage</td>
<td>1. Administrative</td>
<td>5. Curricular</td>
</tr>
<tr>
<td></td>
<td>4. Training</td>
<td>7. Web</td>
</tr>
<tr>
<td></td>
<td>8. Student</td>
<td>9. Network</td>
</tr>
<tr>
<td></td>
<td>2. Helpline</td>
<td></td>
</tr>
<tr>
<td>Many Technology Users</td>
<td>3. Desktop Repair</td>
<td></td>
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<tr>
<td></td>
<td>6. Hardware Installation</td>
<td></td>
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Dynamic Campus Solutions (DCS) selected to advise us on collaboration opportunities and prepare us to collaborate.
Successful Collaboration Needs

- A solid technology foundation
- Reliable systems and network connectivity
- Sufficient/spare Internet bandwidth
- Integrated networks and systems
- Directed, knowledgeable, committed staff
Opportunities for Collaboration

- DCS recommendations for possible collaboration:
  - Network Services
    - Shared network maintenance & support
    - Shared Groupware system
  - Help Desk Services
    - Shared phone operators
    - Shared Help Desk system
  - Phone Service
    - New Voice-over-Internet-Protocol (VoIP) phone system
    - Shared PBX administration
  - Web Services
    - Shared Liquid Matrix
    - Shared Content Management
  - Administrative Computing (ERP)
Selection of Projects

- Shared Help Desk environment - Help Desk software
- Shared Groupware - (email, calendar/scheduling system)
- VoIP analysis and deployment
- Install campus-wide shared network monitoring
- Upgrade Internet connectivity
- Review administrative shadow systems
- Consolidate and optimize servers
Evaluation & Implementation

- Groupware evaluated
  - Novell Groupwise
  - LotusNotes
  - Microsoft Exchange

- Help Desk systems evaluated
  - Track-It
  - FrontRange HEAT
  - RT (open source)
And the Winners Were

- Groupware selected
  - Microsoft Exchange

- Help Desk system selected
  - Track-IT
## History of Collaboration

### 2003

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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</thead>
<tbody>
<tr>
<td>Spring</td>
<td>LFC and K decide to collaborate on a Mellon Grant</td>
</tr>
<tr>
<td>August</td>
<td>$200,000 Grant received</td>
</tr>
<tr>
<td>Fall</td>
<td>Meeting in Kalamazoo, Jim and Lisa discuss approaches</td>
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</tbody>
</table>
History of Collaboration

2004

Feb  LFC and K meet potential consultants for the first time—still thinking about ERP collaboration

Winter  Discussions with GLCA Director resulted in suggestion to hire consultants for project rather than hire a shared project manager

Spring  Negotiations with consultants

Summer  Consultant campus Visit to Kalamazoo College

Fall  Consultant campus Visit to Lake Forest College

Nov  Technology Improvement Plan received results in staffing changes at K and LFC

Nov  NITLE conference in Lisle, Illinois—further discussions ensued with Presidents and CIOs

Dec  Meeting at LFC to discuss specifics of collaboration after both reviews—“Preparation for Collaboration”
<table>
<thead>
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<th>Month</th>
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<tbody>
<tr>
<td>Jan</td>
<td>Signed implementation agreement with consultants</td>
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<tr>
<td>Feb-Dec</td>
<td>Implementation</td>
</tr>
<tr>
<td>April</td>
<td>Demos of Groupware and Help Desk systems</td>
</tr>
<tr>
<td>May - August</td>
<td>Implementation of Groupware and Help Desk systems</td>
</tr>
<tr>
<td>September</td>
<td>Fall Semester roll out</td>
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<tr>
<td>Dec</td>
<td>Wrote second grant to Mellon for training</td>
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Political issues (or now the fun begins)

- **System architecture**
- **What architecture do you use?**
  1. UNIX
  2. Microsoft
  3. Novell
  4. HPux
What Were We Thinking?
Data Center

- Evaluation of our current centers led to decision to contract with a data center in Chicago to house servers.
- Redundant power, multiple access to multiple ISPs.
- Expansion if collaboration grows.
Outcomes

- All servers in Chicago data center
- Separate server farms for groupware and network file storage
- Shared server for Help Desk systems
Where We Are Now
Immediate Savings

- Not as significant as could be
- Negotiated for DS-3’s together
- Better pricing on Microsoft software than if negotiated separately
- Some savings on purchase of hardware
- Definite savings on purchase of Track-IT software and hardware
Where We are Now

- Informal sharing of resources
  - Staff expertise
  - Staff assistance
- Track-IT
  - Running on same server
  - Can see each other's tickets
  - Poised for further collaboration
- Groupware
  - Separate servers, but sharing back-up strategy
  - Poised for further collaboration
Where We Hope to Be

- Positioned for sharing staff
  - Systems administration
  - .NET programming expertise
  - VoIP implementation
  - Help Desk — deeper collaboration
  - Sharing tools and best practices
  - Adding additional partners
What Are We Thinking?
Where We Wish to Be