

SAILS Guaranteed Service Levels:

Administration and Funding *Service Coordinator – Executive Director*

Service Coordinator Responsibilities

Oversight of staff and vendors for financial record keeping and reporting

Liaison between SAILS officers and SAILS financial institutions and financial advisors. Liaison serving on budget, planning, and personnel board appointed committees. Liaison with SAILS treasurer

Retirement Plan Administrator

Hours of Service – Monday thru Friday 8:30 a.m. – 4 p.m.

Where Service is Provided –SAILS headquarters, SAILS website, SAILS email

Description of Services:

Network Management:

Ensure that the network financial books are closed within 5 days of the last day of the month.

Distribute monthly financial reports to the Board within ten days of the close of the previous month's accounts.

Ensure that a complete audit of SAILS financial records takes place within 60 days of the last day of the fiscal year. The audit must be conducted by a Certified Public Auditor familiar with 501(c)(3) organizations.

Conduct an quarterly review of the SAILS investments with SAILS Board members and the network's Investment Manager(s).

Distribute a performance review of SAILS investments to all directors within 15 days of the last day of the fiscal quarter

Distribute a copy of the SAILS audit to SAILS Board members 10 days before the audit is brought to the membership for acceptance.

Post a copy of the previous fiscal year audit on the SAILS corporate website.

Ensure that the appropriate federal and state annual reports no later than October 31 of each fiscal year.

File the Department of Labor Erisa Compliance Forms (Form 5500) no later than July 15 of each fiscal year.

Ensure that all ERISA documents and staff communications are submitted and distributed in compliance with Department of Labor guidelines.

Submit the next year financial action plan to members by October 1 of each fiscal year.

Distribute annual membership assessment estimates to all members by November 1 of each fiscal year.

Provide public libraries with an annual statement of network expenses that can be applied to materials expenditures by March 15 of each fiscal year.

Distribute a report comparing SAILS costs and services with other Massachusetts networks by October 1 of each fiscal year.

Provide SAILS membership with proof that the network has the following coverage: Business Liability, Workers Compensation, Officers and Staff Liability no later than July 31 of each fiscal year.

Communications:

Conduct a minimum of 4 membership meetings per fiscal year. Conduct a minimum of 6 board meetings per fiscal year.

Establish fiscal year meeting schedule at the network annual meeting held each July Post monthly meeting agenda 7 business days before the meeting date

Distribute membership/board meeting minutes 7 business days after the meeting is held Post full Handout packet 5 business days before the meeting date.

Post the monthly warrant 24 hours before the meeting date.

Subscribe all library directors/administrators to the SAILS directors email list 24 hours after the network is informed of his/her appointment

Distribute a compilation of SAILS staff members' activity report from the previous month no later than 7 business days after the last day of the month.

Distribute a compilation of network activities to all directors as part of the Handout packet. Distribute an annual value of service statement to each library within 15 business days after June 30.

Post the most current network documents on the SAILS corporate website for access by directors: By-Laws, policies, financial reports, planning documents, committee and board assignments, current budget, proposed budget.

Distribute an annual report of network activities by October 1 of each fiscal year.

Distribute the network newsletter by the 3rd business day of each month.

Distribute a compilation of network usage statistics by the 5th business day of each month.

Distribute fiscal year statistical summaries for each library by the 15th of July.

Post an annual calendar of meetings and workshops available on the SAILS Corporate website.

Coordinate quarterly group purchase opportunities for barcodes.

Coordinate semi-annual group purchase opportunities for shopper cards
Maintain a supply of commonly needed supplies for on-demand orders

Negotiate with appropriate vendors for discounted and/or group purchase opportunities that fall within the network's mission.

Network Member Responsibilities

Review network documents at the time of distribution

Participate in network meetings and serve on network committees
Regularly check email.

Review proposed/revised network documents at the time of distribution and submit comments as appropriate

Distribute information intended for staff members promptly

Issue payment for annual assessments and outstanding network invoices promptly

Agree to comply with all network policies and procedures once they are approved by the network membership.

External Dependencies

Telecommunications provider failure

Scheduled maintenance for hardware/software upgrades
Server or workstation failure

Failure of state library agency to compile annual reports submitted by networks

Cataloging Services

Service Level Coordinator: Manager of Bibliographic Services Service Coordinator Responsibilities

Supervise SAILS cataloging support staff

Establish internal procedures for the successful provision of services Liaison between SAILS and bibliographic utilities and service providers Advise member libraries on best use of services

Evaluate and recommend services, software, and tools to provide or improve services

Hours of Service – Monday thru Friday 8:00 a.m. – 4:30 p.m.

Where Service is provided: SAILS Headquarters, Member Libraries, Web-based, SAILS Email

Description of Services:

Respond to cataloging requests for newly published materials within 3 business days. Update network authority file monthly.

Respond to requests for data loads of electronic titles within 7 business days. Respond to requests for data loads of new cataloging records within 7 business days. Conduct bi-monthly training on how to submit cataloging requests to SAILS.

Network Member Responsibilities

Follow network approved policies and procedures.

Attend training in order to be able to follow network policies and procedures Be familiar with the ILS staff client

Submit cataloging requests for new titles not in the database at the time of order or receipt and not wait for another library to submit the request or circulate them on temporary records.

External Dependencies

Telecommunications provider failure

Scheduled maintenance for hardware/software upgrades

Scheduled maintenance for hardware/software upgrades by the bibliographic utility Inability to locate copy
cataloging record

Service Requests

Service Level Coordinator: Network Management Team Service Coordinator Responsibilities

Supervise SAILS support staff

Establish internal procedures for the successful provision of services Advise member libraries on best use of services

Evaluate and recommend services, software, and tools to provide or improve services

Hours of Service – Monday thru Friday 8:00 a.m. – 4:30 p.m. Emergency support- Monday thru Sunday 7 a.m. – 9 p.m.

Where Service is provided: SAILS Headquarters, Member Libraries, Web-based, SAILS Email

Description of Services:

Service requests will be acknowledged within 2 business hours of receipt.

Reports of system or telecommunications failure will be acknowledged within 30 minutes of reported outage.

Service requests will be filled within 24 business hours of receipt.

Error reports will be acknowledged within 1 business hour of receipt.

Errors that can be resolved by SAILS will be resolved within 3 business hours of receipt.

Errors that cannot be resolved by SAILS will be reported to the appropriate service provider within 1 business hour of receipt.

Network Member Responsibilities

Immediately report problems that affect the ability to use the ILS, email, or web services. Use SAILS forms and support email (support@sailsinc.org), to request services and report errors.

Include sufficient item/user/error information for SAILS to troubleshoot the reported problem. Respond promptly to requests for follow-up information.

External Dependencies

Telecommunications provider failure

Scheduled maintenance for hardware/software upgrades Hardware failure at the local library

Hardware failure at the local library

SirsiDynix SaaS service or SAILS server malfunction

Communications/Training

Service Level Coordinator: Network Management Team

Service Coordinator Responsibilities

Supervise SAILS support staff Prepare and update documentation Prepare and conduct training

Advise member libraries on best use of services

Hours of Service – Monday thru Friday 8:00 a.m. – 4:30 p.m.

Description of Services:

Staff members will be issued a SAILS email address 24 hours after the network is informed of his/her appointment.

Staff members with institutional email accounts will be added to SAILS email lists at the request of their supervisor within 24 hours of receipt of the request.

The monthly newsletter will include a minimum of two articles explaining software functionality or how to use SAILS services.

Conduct a minimum of 4 training sessions per year the purpose of which will be to introduce new staff members to SAILS services and provide existing staff with skill refresher opportunities.

Post the most current documentation about ILS software and SAILS services on the SAILS corporate site.

Network Member Responsibilities

Be familiar with basic computer operations.

Review all SAILS communications at the time of distribution. Communicate their training needs to SAILS.

Ensure staff members have access to SAILS email and web based communications. Notify SAILS when new staff members require email accounts.

External Dependencies

Telecommunications provider failure

Scheduled maintenance for hardware/software upgrades SirsiDynix SaaS service or SAILS server malfunction

SAILS telecommunications equipment failure

Web conferencing vendor failure

ILS (Integrated Library System) Support Services Description of Services:

Service Level Coordinator: Network Management Team

Service Coordinator Responsibilities

Supervise SAILS support staff

Establish internal procedures for the successful provision of services Advise member libraries on best use of services

Evaluate and recommend services, software, and tools to provide or improve services

Hours of Service – Monday thru Friday 8:00 a.m. – 4:30 p.m. Emergency support- Monday thru Sunday 7 a.m. – 9 p.m.

Where Service is provided: SAILS Headquarters, Member Libraries, Web-based, SAILS Email

Description of Services:

ILS servers will be available for use 99.5% of each month based on a 24X7 service period.

ILS software will be no more than 1 release behind the most current release available from its vendor. New releases will be tested before requesting installation on SaaS production servers.

Sufficient reserve funds will be set aside to allow for migration to another vendor and provide possible overlapping funding for start-up costs. .

Subscribe to a monitoring service to ensure the network Web Portal is available during all scheduled hours.

Monitor vendor performance to ensure that Priority 1 issues are resolved within 4 hours, Priority 2 issues are resolved within 8 hours and Priority 3 issues are resolved within 24 hours of being reported.

Network Member Responsibilities

Review documentation and attend training prior to general release of new software.

Promptly report errors affecting the usability of the ILS Software

Volunteer to pre-test new releases and software

External Dependencies

Telecommunications provider failure

Telecommunication equipment failure at library Scheduled maintenance for hardware/software upgrades SaaS
server malfunction

ILS software error

SAILS telecommunications equipment failure

Desktop Computer Support

Service Level Coordinator: Executive Director Service Coordinator Responsibilities

Supervise SAILS support staff

Establish internal procedures for the successful provision of services Maintain online tools for reporting Desktop Computer problems

Hours of Service – Monday thru Friday 8:00 a.m. – 4:30 p.m.

Where Service is provided: SAILS Headquarters, Member Libraries, Web-based, SAILS Email

Description of Services:

Support and maintain a web-based product for libraries to open support tickets. Acknowledge receipt of opened support tickets within 1 business day.

Provide spare computers for critical applications with 2 business days of receipt of request for service. Close support tickets within 30 business days for 90% of tickets submitted.

Ensure that 100% of the computers covered by Desktop Computer support have current Virus software installed which is updated regularly.

Distribute recommended computer configuration to libraries on each July 1.

Purchase site licenses for virus protection, operating system upgrades, and computer security software to be sold at cost to Desktop Computer support sites.

Install remote troubleshooting software on critical staff computers.

Network Member Responsibilities

Staff members will be familiar with the current Windows Operating System environment and the software applications that they need to use.

An attempt will be made to do some basic troubleshooting – restarting the computer, checking the cables, checking the power before reporting an incident/problem

Report all problems promptly clearly explaining problem encountered and steps taken to resolve the problem via the SAILS Help Desk website or email.

Be available to identify the problem to the SAILS staff member and work with him/her. Develop a hardware replacement schedule

Ensure Desktop computers are operating software that is still supported by the vendor
Ensure computers are backed up on a regular schedule
Understand how to provide access to SAILS support staff for remote troubleshooting.

External Dependencies

Applications provided by software vendors

Slow response by vendors responsible for on-site support

Slow response by vendors responsible to supply replacement parts

Inability to locate replacement parts

Network Website Assistance

Service Coordinator: Assistant Director for Technology Services Service Coordinator Responsibilities:

Oversee operation of network website.

Establish and monitor backup schedule of network website

Install and maintain services required to support network website.

Hours of Service – Monday thru Friday 8:00 a.m. – 4:30 p.m.

Description of Services:

SAILS will maintain a network website to provide a means for libraries to log support tickets and find documentation on network services.

SAILS will assist libraries in the procurement of domain names for their library websites & web hosting services

Network Member Responsibilities

Maintain domain name registration, or arrange for SAILS to do so

Be familiar with website management and website design

Exceptions

Telecommunications provider failure

Scheduled maintenance for hardware/software upgrades

CUSTOMER SERVICE

Service Coordinator – Assistant Director for Technology Services, Manager of Bibliographic Services

Coordinator Responsibilities

Serve on network advisory committees

Network liaison between SAILS and vendors providing products intended for public use. Evaluate and develop appropriate web based services

Customize SAILS public and corporate websites Customize SAILS User Discovery Platform

***Hours of Service – Monday thru Friday 9:00 a.m. – 4:30 p.m. Where Service
is Provided –SAILS headquarters, SAILS website***

Description of Services:

Support and enhance network User Discovery Platform(s)

Evaluate and select catalog enhancement products to improve the customer experience

Provide consulting and assistance to members developing links between SAILS services and the library web page.

Provide cataloging and metadata for digital collections developed by member libraries.

Provide hosting for digital collections.

Participate in the Massachusetts Digital Commonwealth Portal Participate in the Massachusetts Commonwealth Catalog

Support the development and use of the SAILS downloadable collection Develop appropriate marketing tools for libraries to publicize SAILS services.

Develop appropriate help files and documentation for patrons using SAILS services.

Provide help desk services for patrons with technical problems beyond the ability of the staff of member libraries.

Network Member Responsibilities

Provide representation on network advisory committees Distribute patron appropriate marketing materials

Ensure that staff members are trained in the use of SAILS customer oriented services

External Dependencies

Telecommunications provider failure

Scheduled maintenance for hardware/software upgrades

Outages due to changes made by Commonwealth Catalog Support Agency

ASSESSMENT

Service Coordinator – Executive Director Service Coordinator Responsibilities

Develop evaluation tools used to measure network performance and user satisfaction

Hours of Service – Monday thru Friday 8:30 a.m. – 4:00 p.m.

Where Service is Provided –SAILS headquarters, SAILS website, SAILS Email, SAILS Survey Vendor

Description of Services:

Evaluation of service to members

Conduct an annual survey of library staff members to measure the level of user satisfaction with SAILS services.

Conduct an annual survey of library directors to measure the level of satisfaction with the management of the SAILS network.

Network Member Responsibilities

Respond promptly to network invitations to provide feedback.

External Dependencies

Telecommunications provider

Server and telecommunications hardware vendors Survey service provider(s)

Evaluation of SAILS staff

Conduct an annual performance evaluation of network staff

Network Member Responsibilities

Report any concerns about staff performance promptly to the Executive Director Report any concerns about network management performance to the Network President

External Dependencies

State and federal labor laws and regulations

Evaluation of Customer Oriented Services

Conduct an annual survey of users of SAILS services to measure user satisfaction and develop/enhance customer based services.

Network Member Responsibilities

Encourage public participation through links on individual library websites

External Dependencies

Telecommunications provider failure

Scheduled maintenance for hardware/software upgrades Outages due to Survey Software vendor