Appendix A

INFORMATION SYSTEMS SERVICES AGREEMENT

WHEREAS *Schedule A – Information Systems Services Agreement* forms part of *The Oakville Public Library Board and the Town of Oakville – Memorandum of Understanding* (MOU) agreement. The MOU agrees to services provided by the Town of Oakville (Town) to the Oakville Public Library Board (Library) and acknowledges each party's role and relationship as it pertains to the delivery of library services under the *Public Library Act.*

NOW THEREFORE THE LIBRARY AND THE TOWN HEREBY STATE AS FOLLOWS:

1. General Agreement

1.1 ITS Role and Responsibility

Corporate Responsibility for IT Assets and Services in a Risk-Mitigated Manner:
- **Cyber Security** – Provide cyber-security on behalf of the Town
- **ITS Linear Assets** – Network and telecommunication cabling
- **ITS Hardware Assets** – Servers, Storage Area Networks (SAN), Storage, Add/Drop MUX, Staff End Points (e.g. Cell Phone, Laptops, Communal Workstations, Printers, etc.), Network Switches, Routers, etc.
- **ITS Software Assets** – Business Applications, IT Applications, End Point Applications, Databases, Middleware, etc.
- **ITS Services** – service enablement of assets, Access, Asset/Lifecycle Management of ITS Assets, etc.

   Inferred Items:
   - **Governance and Risk Management** – Purchasing & Facilities related to ITS Assets and Services
   - **ITS Architecture & Design**

1.2 Policy, Roles & Responsibilities
- Library staff will follow the Town's Information Technology policies, practices, and standards.
- ITS staff will follow OPL's policies, practices, and standards.
- ITS and OPL will abide by the roles and responsibility documentation (*Appendix* A)

The Town, in its service provision to the Library, will not conflict with established Library policy. Reciprocally, the Library in its service provision will not conflict with established Town policies including but not limited to ITS Policies. The Library is responsible for notifying the Town of relevant Library public policies, which include but are not limited to the following: Confidentiality of Individual Patron Borrowing Records, Intellectual Freedom, Internet Access & Acceptable use.

Appendix A

Library employees shall sign, at time of hire and annually thereafter, and agree to abide by the employee Library Code of Conduct Policy which includes Appropriate Employee Use of Information Technology and Social Media.

The Library is responsible to inform the Town of employee departures who will then disable access and archive email.

The Library is also subject to municipal freedom of information and protection of privacy act (MFIPPA) file and email search as required consistent with the Town of Oakville.

1.3   Other

1) The Library will meet regularly with ITS regarding information technology planning, working together to develop a mutually beneficial approach and roadmap. The intent is to share upcoming initiatives of interest to both parties and to identify where further discussions are required.
2) ITS will inform and collaborate with Library on all the asset changes or new assets implementation that are in use at Library and supported by ITS, to ensure the Library requirements are considered and met by the changes or new assets.
3) ITS will provide Library staff with new employee setup and access to Town technology in a manner consistent with Town of Oakville. This typically includes email and access to Town shared network resources, financial systems, and online utilities.
4) ITS will provide Library staff with setup and access to Library-specific technology that ITS supports for the Library.
5) In a manner consistent with the services provided to Town departments, ITS will provide vendor management for ITS-supported information technology as detailed in the sections below.
6) The Town will advise the Library of any planned downtime or maintenance that will affect Library services. The Town will provide a minimum 48-hour advance notice where possible for the Library to ensure that they can advise and mitigate any customer impact. ITS will make every effort to accommodate the library schedule.
7) If the Town elects to outsource technology or services typically covered by ITS, the Library will express its service level requirements for the technology provided by the Town or implemented in collaboration with the Town or review its options for alternate service provision. Outsourced work on assigned ITS roles and responsibilities will be covered via ITS budget. Outsourced work on assigned Library roles and responsibilities will be covered via the Library budget.

2. New and Expanded Assets and Services

ITS will provide architecture and design services for ITS assets in a manner consistent with services offered to Town departments.

All ITS-purchased/supported assets become the property of the Town (this supports the model for ongoing lifecycle of said assets).

Implementation of new services or expansion of existing services for assets and services that ITS manages and supports for the Library, requires agreement from both parties. Requests must be submitted to ITS. Depending on the cost, effort, and new workload, the request may require a business

case through the budgetary process or may be accommodated within existing operational budget with documentation.

The Library will inform ITS of implementation of new services or expansion of existing services for assets and services that the Library manages and support, where integration with ITS-supported assets or Town network access is required. The Library and ITS will collaborate on requirements and implementation timelines for these services. ITS will act as a consultant and provide technical guidance for requirements including estimates where applicable. ITS will act as a consultant and provide security and network integration expertise and guidance for requirements where applicable. Depending on cost and effort required from ITS, the request may require a business case through the budgetary process.

For all new or expanded services, being supported either by the Library or ITS, agreed-upon roles and responsibilities (Appendix A) will be documented in the attached reference that identifies ownership, costs and on-going operational budget and support impacts.

On larger initiatives (e.g., introduction of new technologies or substantial expansion of ITS-supported assets), for ITS to become formally engaged, projects must have a supporting business case with:
- Clear roles and responsibilities defined up front
- Cost of the new or expanded service
  - Operational support requirements agreed upon
  - Operational budget funding arranged where required
- Risk assessment
- An identified project manager
- Agreed upon deliverables
- Agreed upon timelines
- Agreed upon items to be added to the shared Roles and Responsibilities document attached in the appendix

ITS will provide the Library with visibility over status and timelines for Library requests.

2.1 Funding

For expansions of existing information technology services, the cost and labour impact will be identified and documented. Some requests may be accommodated without cost or impact. Thresholds within this area will be agreed upon between ITS and the Library.

Implementation of new technologies and/or a substantial expansion of ITS-Supported Services (Non-Standard Requests) will require a business case through the budgetary process.

2.2 PM and BA Services

ITS will provide project management and business analysis as a service in a manner consistent with Town departments. Requests must be submitted to ITS.

Appendix A

3. In-Service ITS Domain Assets and Services

For all assets and services that have been implemented from a Town-approved budget initiative (see

New and Expanded Assets and Services), ITS will install, maintain, manage, update, fix and fund the lifecycle of assets and services employed by the Town and Library as listed below herein.

ITS will provide daily operational support for these services to Library staff as per *ITS Support Service* section herein.

ITS will provide the Library with infrastructure technology and services in a manner consistent with Town departments.

3.1 Infrastructure Services

3.1.1 Infrastructure Technology
ITS will provide the Library with infrastructure technology in a manner consistent with Town departments.

This would typically include the following:
- Network connectivity between the Town and Library facilities for both staff and public access
- Server and Operating System, where needed, for library-specific software.
- Disaster recovery and business continuity planning as part of the Town plan specific to ITS services and assets.

ITS will collaborate with the Library on integration of Specific Library Equipment into the Town or public domain. The Library will provide requirements to ITS through a non-standard request.

3.1.2 Staff Internet Access
ITS will provide Library staff with internet access, including wireless staff access for use at Library branches and administrative office including related assets in a manner consistent with Town departments.

3.1.3 Meeting Room Technology
ITS will provide the Library with meeting room technology in a manner consistent with Town departments, for all internal and public facing meeting rooms across Library branches.

This would typically include the following:
- Projector or TV screen
- Workstation or device docking station providing plug-in capability for a roaming device such as smartphone or laptop
- Webcam & Audio to support virtual meetings
- Network and staff internet connectivity as outlined within the *Infrastructure Technology* and *Staff Internet Access* sections
- Public internet connectivity

Appendix A

3.1.4   Cyber-security protection

ITS shall deliver Cybersecurity protection to the Oakville Public Library in alignment with the standards and practices employed across all Town of Oakville's departments, as detailed in the Town of Oakville Information Technology Services Cybersecurity Plan.

This encompasses security measures for both internal and public network clusters, while specifically excluding aspects of physical security and access related to facilities (e.g., building access, card readers).

ITS is not responsible for cyber security of any devices connected to the PAC network. ITS will collaborate with the Library to provide restoration of images on the Library's PAC computers should they become compromised.

The scope of Cybersecurity Protection includes, but is not limited to, boundary firewalls, internet gateways, secured configurations, user access control, malware protection, as well as safeguarding systems and communication integrity.

3.2   Endpoint Services

3.2.1   Staff Hardware

ITS will provide Library staff with technology required to perform their job duties in a manner consistent with Town departments (also supporting work from home). This would typically include the following:
- Communal workstations for shared staff counter usage
- Computer station (desktop, laptop or tablet) and related peripherals such as keyboard, mouse, monitor and docking station where required
- Multi-purpose devices like printers, scanners, photocopiers
- Smartphones (as required)
- Telephone equipment/software
- Barcode scanners
- Financial related devices/POS
- Receipt printers

3.2.2   Staff Software

ITS will provide Library staff with software required to perform their job duties in a manner consistent with Town departments. This would typically include Town standard operating system and application software in addition to specialized software for select Library users if supported by the Town.
ITS will provide Library staff with installation, configuration, daily operational support and lifecycle management for Library specific applications that are supported by ITS as specified in the Roles and Responsibilities detailed document (Appendix A).

3.3   Public Access Assets

3.3.1   Public Internet Access

ITS will provide internet access for Library customers, wired and wireless access, for use at Library branches including related assets in a manner consistent with Town departments.

Appendix A

The Library acknowledges that all assets connected to the public internet, as well as public-use non-domain devices, have an inherent cyber-security risk.

Internet access requires user consent to the Library's policy on *Internet Access & Acceptable Use* including consequences if this is not followed when using Library information technology services daily.

3.3.2 Endpoint Hardware for Public Access

ITS will maintain the fleet of public access computer stations at the Library. This includes:
- Budgeting
- Procurement of new/replacement equipment
- Managing the inventory
- Performing lifecycle activities as part of the ITS operational plan.
- Provide admin access to the library staff to maintain/update apps as required

This typically includes computer (desktop, laptop, tablet), monitor, keyboard, and mouse.

ITS will support the Library with the fleet of iPads and iMac stations used for Public Programming. This will typically include:
- Budgeting
- Procurement of new/replacement equipment
- Initial standard equipment setup
- Provide admin access to the library staff to maintain/update apps as required

3.3.3 Endpoint Software for Public Access

ITS is responsible for Image management of the public access computer stations, based on requirements in consultation and collaboration with the Library.

ITS will ensure currency of the image.

ITS will fund the standard systems/applications in a manner consistent with Town departments (e.g. operating system, etc.) for the public stations fleet. The Library will fund the Library specific software requested for the public computer stations (e.g. 3D Printing Cura software). The library will consult ITS on the possibility of leveraging volume price discounts across town departments if available.

3.3.4 Printing & Scanning Technology for the Public

ITS will provide printing and scanning technology public use (Oakville residents that require printing, scanning etc.).   These devices are considered ITS Domain Assets but are available for the public to access.

ITS will provide Library staff with lifecycle management and funding, installation, configuration, integration with other Library systems, and daily operational support for these assets, both hardware and software.

3.4 Line-of-Business Applications and OPL Website

ITS will provide portfolio management for Library's line-of-business applications and the Library Website in a manner consistent with Town departments.

Appendix A

3.4.1   Daily Operational Support

ITS will provide daily operational support to Library staff in a manner consistent with Town departments as per ITS Support Service section herein and outlined in the Roles and Responsibilities detailed document (Appendix A).

The Library is responsible for all data entry related activities and running of reports related to the Library business processes, as well as website content and website customer experience enhancements/front end.

3.4.2   Lifecycle Management

ITS will perform regular lifecycle management for line-of-business applications (including library website) and related integration technologies. This will typically include installation, upgrades, patching, and remediation of security vulnerabilities. ITS will work in collaboration with Library staff for planned lifecycle activities.

The Town is responsible to procure, install, maintain, manage, fix, update and fund the supported technology outlined in the Roles and Responsibilities detailed document (Appendix A).   The operational budget related to line-of-business applications will be managed by ITS.

In some cases, unique skill sets are required in order to enhance/improve applications to meet business needs. For these situations Library and ITS would identify the skill set required along with the frequency and volume of requests. ITS may choose to either invest in training inhouse staff (where frequency and volume are high, and staff possess a similar skill set) or work with Library to identify and request an appropriate budget to accommodate the Library workload.   This type of request, where required would align with Town budget cycle timelines.

3.4.3   Line-Of-Business or Website Enhancements

Both the Town and Library acknowledge that business needs and technologies are constantly changing. Enhancement requests would follow the process outlined in the *New and Expanded Assets and Services* section.

ITS has a limited budget to enhance/improve applications that covers all Town managed applications. Items that cannot be absorbed operationally by either ITS or the Library would result in additional budget requests. An example would be a significant technology change for a core application such as Symphony that may require additional consulting services in order to migrate to the new technology. This type of request would be discussed together and planned for accordingly.

ITS may choose to either invest in training inhouse staff (where frequency and volume are high, and staff possess a similar skill set) or work with Library to identify and request an appropriate budget to accommodate the Library workload.   This type of request, where required, would align with Town budget cycle timelines.

Appendix A

4 Library Assets and Services

4.1 Operational Technology

Library assets are the responsibility of the Library to fund, operate and maintain unless an arrangement and agreement has been made with ITS.

Where operational technology is to be installed at a non-Town owned facility, the Library will collaborate with ITS to identify risk averse solutions for connectivity. The Library will bear the costs associated with the project implementation (including project manager funding where required) and on-going operational costs (e.g., monthly cellular data charges).

ITS will provide the designated Library staff with access to the ticketing system, to ensure support for Library by enabling ticket queues, reports and statistics.

4.1.1 Library-Specific Equipment

The Library will be responsible for determining equipment offerings as well as the provision, purchase, installation, lifecycle, ongoing maintenance, daily operational support of Library-Specific Equipment (hardware and software). The operational budget related to library-specific equipment will be managed by the Library.

This includes:
- Collections management devices such as Self Checkout kiosks, AMHS Sorters, Remote Lockers, Browse and Borrow kiosks, RFID Pads, Scanning wands etc.
- Collection protection devices such as security gates.
- Community services devices such as food lockers, Info Pods, etc.
- Hotspots for public use
- Charging stations
- Creation Zone equipment

The library may choose to add or enhance assets as needed to support the demand in services from the Library customers. ITS will be informed and involved in the initiatives as outlined in

New and Expanded Assets and Services section herein.

ITS will provide designated Library staff with administrative access on the Library-specific devices and access to the management apps configuration files and logs.

ITS will support Library staff on integration with other ITS-supported systems, network infrastructure (Town network or public network) and staff stations as per *ITS Support Service* section herein and outlined in the Roles and Responsibilities detailed document (Appendix A) .

4.1.2 Specialized Business Applications

The Library is responsible for determining application offerings as well to procure, configure, maintain, manage, fix and update the Specialized Business Applications as outlined in the Roles and

Appendix A

Responsibilities detailed document (Appendix A). The library will consult ITS on the possibility of leveraging volume price discounts across town departments if available.

The Library is responsible for the purchasing funds. The operational budget will be managed by ITS.

ITS will collaborate with OPL on network connectivity requirements and integration of new software with library software supported by ITS (see

New and Expanded Assets and Services section).

4.2   Public Support

The Library is responsible for all public-facing support and communication with their patrons including first line troubleshooting for technology supported by the Library.

ITS will support the library staff with troubleshooting for technology supported by the ITS, as per sections above herein and the Roles and Responsibilities detailed document (appendix A).

4.3   Library Staff Training and Documentation

The Library is responsible for training their staff on day-to-day use of Line-of-Business and Specialized Library applications and the user guide documentation. This support is functional in nature and requires a business understanding.

5   ITS Support Services

ITS will provide incident support for ITS Assets and Services in a manner consistent with Town departments. The Library must enter support requests for all services required and ITS will determine the appropriate category (Incident/Issue, Standard Request or Non-Standard Request). ITS provides a support team rather than a specific contact to ensure multiple staff are qualified to provide consistent service.

ITS is responsible for:
- Day-to-day *technical* support for ITS supported technology. This support is technical in nature and generally requires IT experience and expertise. Refer to Appendix A for specific details.
- Maintaining a knowledgebase of supported technologies that contains ITS installation notes, troubleshooting or other pertinent details as required to provide technical support.
- Technical training of ITS staff to ensure support is provided in a manner consistent with Town departments as mentioned herein on Library specific technologies.
- Providing Library staff with administrative application access where required to enable the Library to configure and maintain the business functions.
- Providing a level of visibility on OPL incidents and service requests and their status in the same manner as is provided to Town departments.

Appendix A

5.1   Support hours

At a minimum, ITS will provide support during these hours unless otherwise agreed to in writing with the Library:

> **Monday – Friday 8:30 am to 6 pm EST, excluding holidays.**
>
> **Emergency Outage/Incident Support**
> After hours emergency support is available at the on-call number.
> Emergency support is provided for lack of service for large business functions.
> Typically, examples would include outage of the ILS, Library web site outage, phone system outage, network outage, internet connection outage, or wireless outage.
> After hours support is provided on a best-efforts basis.

5.2   Support Types

5.2.1   Incident (Service Outage)

Widespread outages take priority over individual incidents.   These incidents will typically involve a broadcast related to the service disruption. The support staff will work closely with the Library on restoration of services to enable the Library to communicate to the public in a timely manner where required.
Acknowledgement: 1 hour during business hours, best efforts after hours
Timeline: Troubleshooting work to start within 2 hours since acknowledgement and status update to be provided to OPL regularly as per Appendix A.

5.2.2   General Incident/Issue

A general incident is typically a situation where functionality for a town supported equipment or software application does not work as expected. This could be an individual incident or one that affects multiple users (staff or customers).
Acknowledgement: 4 hours during business hours
Timeline: Troubleshooting work to start within 1 day since acknowledgement. Regular status update to be provided to OPL.

5.2.3   Standard Requests

A standard request is a routinely performed request of ITS with a generally known turn around time per each service.   Typical examples would include desktop software installations, application access, toner replacement, password resets, onboarding/offboarding/cross boarding, etc. For specific SLA's please see the attached spreadsheet in Appendix A that contains Library specific services.
Acknowledgement: Within 1 business day
Timeline: Varies per service. ITS will provide estimate time of completion when task is assigned - ITS will publish a service catalog with established service targets in the future.

5.2.4   Non-Standard Requests

New requests or enhancements that involve ITS resources. These requests typically require a conversation to be full understood, scoped and to determine cost and execution channel. These are initially reviewed by the ITS Intake committee (weekly) and assigned out for discussions with the requestor to investigate further.
Acknowledgement: Within 1 week

Appendix A

Timeline: Requires assessment – ITS will provide committed effort, duration and proposed scheduled implementation timelines within 2 weeks since the request has been placed. The implementation timelines will follow guidelines outlined in appendix A.

5.3 Support Escalation Process

If there is a breach of commitments to the specified support targets, the Library will adhere to the following escalation sequence to seek resolution.   At all times, front-line staff will attempt to resolve the breach at their respective levels before seeking escalation.

Level	OPL	ITS	When
1	Manager/Director	Supervisor/Manager	Breach time + 4 hours
2	CEO	Director	Level 1 escalation + 1 day
3	Commissioner	Commissioner	Level 2 escalation + 1 day

5.4 ITS Support Staffing

ITS is responsible for the recruitment and selection of staff that provide support services in a manner consistent with Town departments. To facilitate a successful hire, the Library will provide the Town with core competencies to assist with recruitment and selection.

6 GLOSSARY

Cyber-security - the protection of systems comprising hardware, software, and data from cyberthreats.

Domain Assets & Services – refers to the network and infrastructure that is centrally managed by Town ITS staff and may be referred to Town Domain or ITS Domain.   This is where all data centre assets and critical services are connected for the town to provide services to its customers, residents, and patrons.

ITS Linear Assets – Network cabling and Telecommunication cabling.

ITS Hardware Assets - Servers, SAN, Storage, Add/Drop MUX, End Points (Cell Phone, Laptops, Printers, etc.), Network Switches, Routers, DWDM, etc.

ITS Software Assets - Business Applications, IT Applications, End Point Applications, Databases, Middleware, etc.

ITS Services – Core service delivery provided by ITS to support to service enablement and maintenance of IT assets, access, and Asset/Lifecycle Management activities.

In Service (ITS Domain) Assets – ITS Domain Assets are items that the ITS department is fully responsible for (lifecycle, vendor management, procurement, installation, configuration, operational budget, support services).

Appendix A

Public Access Assets & Services – Refers to IT endpoint hardware and software made available for public use.

Library Assets – Assets which the Library is fully responsible for (lifecycle, vendor management, procurement, installation, configuration, operational budget, support services).

Line-Of-Business Library Applications – refers to software and applications that are specific to library business. Examples would include: Integrated Library Systems, Library Online Catalogue, Library Mobile Application, etc.

Specialized Business Applications – refers to software and applications that have specific functionality related to a service that the library offers. Examples include: Library Programs and Events Management Application, Donations Management, Reading Programs Management, etc.

Lifecycle management – Patching, update, upgrade or other maintenance to keep assets in a state of good repair.

New Services – Services that did not previously exist. Examples include: New applications, new technology devices, etc.

Expansion of services (hardware) – Changes to existing services that increase the number of assets and would have impacts in terms of costs to deliver or maintain services. Examples include: 1 device exists today and 10 new devices are being requested, increase in licensing, changes to subscriptions, adding a new module to an application, etc.

Expansion of services (software) – Changes to existing applications that would increase maintenance and would have impacts in terms of costs to deliver or maintain services. Examples include: adding a new module to an application, add integrations to another application, etc.

Incident -- An incident is a situation where there is a service outage or where someone is unable to perform their job duties.

Standard request – refers to requests that are routine in nature and have documentation and processes in place to support an expected delivery timeframe. Examples would include: onboarding, a new device, password reset, toner request, etc. These items are planned to be part of a service catalog in the future.

Non-Standard Request – refers to a non-routine request that requires further discussions to understand requirements, timelines and desired outcomes. These could result in small operational tasks such as creating a new report, medium sized tasks such as an advanced workflow or larger initiatives that involve major expansion of services and/or new services. Larger requests/initiatives could have significant resource burdens to consider (financial, staff time, etc.) and as such may require business cases for requesting appropriate budget.

Acknowledgement -- The incident/request is assigned to a team member of the corresponding support queue and prioritized.

Appendix A

Appendix C - ITS OPL Assets Services - Roles and Responsibilities

Spreadsheet attached.

It is important to note that aforementioned spreadsheet is a living document that will be updated based on new or expanded services as identified through:

- The Towns formal budget process – documented by comprehensive business cases where ITS and OPL collaborate
- The Towns ITS Non-Standard request process – documented through a non-standard IT service request in collaboration with ITS and OPL