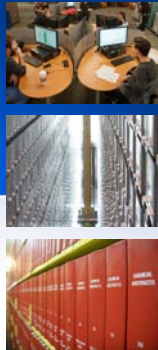


Unified System




RFP Recommendation

David Walker & Brandon Dudley
California State University
Office of the Chancellor


Quick Recap

- Review of process
- Review of recommendation
- Review of COLD discussion
- Q & A




Why a Unified System?

- Current Costs
 - We spend more on individual contracts
 - Cost barriers to functionality for some campuses
 - Productivity Costs from duplication of effort
 - Opportunity Costs
- Change in the marketplace
 - Millennium, Voyager, SFX now “legacy” systems.
 - Not a matter of if, but when and how




Goals of the RFP

- System must be operational
- Cloud-hosted
- Consortium functionality
- Local control when desired
- Fully integrated
- Support CSU resource sharing
- Full analytics capability
- Robust discovery system




Responses

- Written responses
 - Five responses for Staff Functions
 - Six responses for Discovery
 - 2,000+ pages
- Presentations
 - 3 vendors for Staff Functions
 - 5 vendors for Discovery



Evaluation timeline

Nov-Dec. 2014	Written responses evaluated
Feb 16-20	Discovery webinars
March 2-4	Staff Function demos
March 16-27	Reference calls, follow-ups
March 27	Recommendation
April 9	Presentation to COLD



Evaluation Committee


- David Walker
Chancellor's Office
- Brandon Dudley
Chancellor's Office
- Elizabeth Altman
Northridge
- Mary Dolan
Sonoma
- Julie Kowalewski-Ward
San Jose
- Lauren Magnuson
Northridge
- Cyril Oberlander
Humboldt
- Rae Ann Stahl
San Jose
- Tim Strawn
San Luis Obispo
- John Wenzler
East Bay



Recommendation


“The ULMS RFP Committee is pleased to recommend...that the CSU enter into negotiations with Ex Libris....Although Alma is not a perfect solution and must achieve specific improvements before 2017, we believe that its comprehensive consortial support, established strength in electronic resource management, and Ex Libris’ vision for the future position Alma as the system best able to meet the current and forecast needs of the CSU.”

-- Recommendation to COLD 03/27/15




Benefits

- Decreased annual costs
- Offload system maintenance to vendor
- Streamlined and centralized ERM
- New functionality for most campuses
- More automated and collaborative cataloging
- Greater CSU resource sharing
- Greater opportunity for collaboration between campuses across all functional areas




Challenges

- Major disruptive change
 - Change in workflow
 - Change in level of collaboration
 - Change in vendor and culture
- Readiness of staff to implement
 - Migration preparedness
 - Campus project manager




Challenges (cont'd)

- Vendor questions / contract negotiation
 - Migration, “Network Zone” timing
 - Primo, COUNTER Stats
 - Macros, short-cuts, less “click heavy” tasks
- CSU governance
 - Structure
 - Centralized or decentralized
 - Compromises in local vs. consortial practices



How the CO Will Help

- Implementation costs covered
- Additional Staffing – still under discussion
 - Project Director
 - (Data) Migration Specialist
 - Workflow specialist
 - Consultants
- Peers
 - Sacramento, San Marcos, Orbis Cascade



Advice from Orbis Cascade & San Marcos

- Go into the process with eyes wide open!
- Data clean-up pre-migration is important
- Alma is not ill. Holding onto current workflows leads to an unhappy experience in Alma.
- Ex Libris provides responsive support during the entire process
- Alma is still evolving, maturing
- Most believe in Ex Libris' vision for the future



COLD's vote

- To enter into negotiations with Ex Libris
 - Form Negotiation Committee
 - Address concerns verbally and through contract
 - Negotiate final, best costs
- Implementation waves (TBD)
 - 3 cohorts, smaller first wave
 - First go-live in May 2016
 - Data clean-up



Negotiation Committee

- | | |
|---|-----------------------------------|
| • Gerry Hanley
Chancellor's Office | • Mark Stover
Dean, Northridge |
| • Eddie Choy
Chancellor's Office | • John Wenzler
Dean, East Bay |
| • David Walker
Chancellor's Office | • Rae Ann Stahl
San Jose |
| • Brandon Dudley
Chancellor's Office | |

