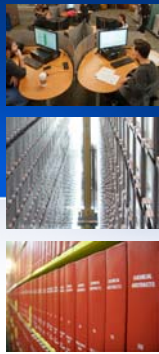


Unified Library Management System




Updates

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California State University
Office of the Chancellor


Where Are We Today?

- Negotiation phase
- Regional meetings (hi!)
- Summer / Fall planning




Negotiation Phase

- Three phases
 - Fact-Finding (early/mid May)
 - Position Clarification (mid/late May)
 - Face-to-Face Contract meeting (June 4-5)
- Contract expected to be finalized by late June




Regional Meetings

- What’s coming down the pike?
- CSU Alma campuses – what’s Alma like?
- Meet with colleagues to discuss potential issues

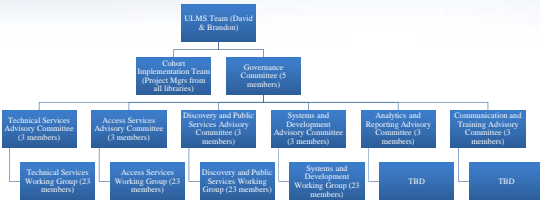


Summer/Fall planning

- Governance Structure
- Cohort decision
- Preparation Information (end of day)




Governance Structure (proposed)



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graph TD
    ULMS[ULMS Team (Davis & Brandon)]
    ULMS --- Cohort[Cohort Implementation Team (Project Mgrs from all libraries)]
    ULMS --- Governance[Governance Committee (5 members)]
    Cohort --- Tech[Technical Services Advisory Committee (3 members)]
    Cohort --- Access[Access Services Advisory Committee (3 members)]
    Cohort --- Discovery[Discovery and Public Services Advisory Committee (3 members)]
    Cohort --- Systems[Systems and Development Advisory Committee (3 members)]
    Cohort --- Analytics[Analytics and Reporting Advisory Committee (3 members)]
    Cohort --- Comm[Communication and Training Advisory Committee (3 members)]
    Tech --- TechWG[Technical Services Working Group (23 members)]
    Access --- AccessWG[Access Services Working Group (23 members)]
    Discovery --- DiscoveryWG[Discovery and Public Services Working Group (23 members)]
    Systems --- SystemsWG[Systems and Development Working Group (23 members)]
    Analytics --- TBD1[TBD]
    Comm --- TBD2[TBD]
  
```



Governance Structure (proposed)

- CO Team
 - David, Brandon, Alice, Jessica, Ying, and more!
- Governance Committee
- Advisory Subcommittees
- Functional Area Working Groups



Governance Committee

- 5 members
- David, Brandon
- 1-2 Deans, AUL/Assoc. Deans
- Overall project management scope – address issues and set best practices for entire system



Advisory Subcommittee

- 1 for each functional area
- 3 members from senior staff (dept. heads and subject experts)
- Scope – address issues and set best practices for their functional area



Functional Areas

- Tech Services
- Access Services
- Discovery & Public Services
- Systems & Development
- Analytics & Reporting
- Communications & Training



Working Groups

- 1 for each functional area
- Comprised of subject expert representative from every campus
- Scope – analyze and discuss issues and practices in functional area and propose solution(s)
- Involved in forming decisions and crafting responses to issues related to their areas of expertise




Cohort Options

- Survey to deans for preferences
 - MANY campuses want to be in first wave!
 - Some campuses worried about wait, losing momentum
- Request to Ex Libris for other implementation timeline options to implement sooner
 - Single Cohort Model – under consideration by COLD




Single Cohort Model

- All 23 campuses (plus Moss Landing) to implement together - go-live date of **May 2017**
- This may be considered Ex Libris' normal approach:
 - U of Wisconsin (26 libraries)
 - LIBIS Consortium (30 libraries)
 - BIBSYS (100+ libraries)




Single Cohort Timeline

- Planning and setup -- Fall 2015
- Initial test load into sandbox system -- December 2015. This would consist of records from three representative CSU campuses (TBD)
- In person training -- Spring/Summer 2016
- Testing continues through 2016
- Final load -- April 2017
- Go-Live -- May-June 2017




Single vs Three Cohort models

| Single Cohort | Three Cohorts |
|--------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| Technical issues such as reconciling/normalizing data in the Network Zone would be lessened and/or mitigated | More time for some campuses to prepare |
| Longer testing period (18 mos vs. 6 mos) | Some campuses would be able to implement Alma sooner |
| All campuses can participate equally & work together from the get-go, instead of waiting for their cohort | More time to shake bugs out of system before complete integration |
| Impact on CO staff greater, lessened ability to learn from initial implementations | Longer wait for consortial and third-party functionality to be implemented |






Break-out tables

- Acquisitions
- Circulation
- Cataloging
- ERM
- Discovery
- Systems




Unified Library Management System


Moving Forward

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Next Steps

- Sign contract!
- Finalize overall implementation schedule, structure with Ex Libris
- Ask deans for functional area representatives/project manager
- There will be more in-person meetings!



What can you do to get started?

- Data clean-up
 - Need your thoughts
- Process documentation
 - Capture local practices
 - What do you do that's unique to your situation?
- Training

