

Project Name UW System Library Services Platform Project	Project Number N/A	Projected Start Date 2/1/2014	Projected End Date 6/30/2015
Executive Sponsor CUWL Executive Committee	Project Director Mitchell Lundquist	Project Manager Paula Sumpter	
Planning Period 2QTR14	Est. Operating \$1,988,460	Est. Capital \$0	

Goal

To configure and implement the Alma LSP to achieve the UW Systems' stated objective - "One System, One Library."

Statement of Need

On behalf of the Council of Wisconsin Libraries, UW System Administration has signed a contract with Ex Libris and acquired the Alma library system - a robust LSP that will provide high quality and cost-effective services to its users.

Issues driving the purchase:

1. Disparate functional and operational systems hamper service delivery
2. Separate public catalogs complicate discovery and sharing of resources
3. Significant duplication of work across the system reduces staff efficiency
4. Non-integrated UWS enterprise systems hamper efficiency of library management and business practices
5. Lack of single platform complicates the making of decisions based on what's best for all libraries in the consortium.

Expected Benefits

1. Complete functional and operational integration will improve service delivery
2. Access to a unified UWS public catalog interface will simplify discovery and sharing
3. Less duplication of work will increase staff efficiency
4. Integration with key UWS enterprise systems will improve business practices
5. A single consortium platform through which back office functions are conducted will facilitate consortium decision making

Potential Risks

1. Reallocation of UW project resources to other priorities may cause delays
2. Slippage of the vendor schedule

Scope

1. Project definition and administration
2. Alma system configuration
3. Data review & migration
4. Workflow & procedure review
5. User training
6. Post go-live assessment
7. Transition to vendor support mode

Stakeholders

The people of the State of Wisconsin, UW System administration, faculty, staff and students. Primary participants include UW System library staff from all campuses.

Metrics

Metrics will not be defined for the planning process. Metrics will be defined by the finished project plan and reported in the form of ongoing measurement and reporting of project status.

Deliverables

1. Project charter, timeline & plan
2. Project update reporting
3. Project wiki tool/site for collaborative discussions and content management
4. User training videos and workshops
5. Data migration
6. Fully implemented Alma LSP

Assumptions

1. Team members will be available to attend meetings and provide input.
2. Vendor will deliver on schedule

Definition of Terms

- Alma: LSP product from Ex Libris
- CUWL: Council of Wisconsin Libraries
- LSP: Library services platform.
- Wiki: Web application which allows team members to add, modify or delete content in collaboration with others.

Team Roster

Team Member	Title	Project Role
Mitch Lundquist	Manager, Computer Operations, UW Madison LTG	Project Director
Paula Sumpter	Project Coordinator, UW Madison LTG	Project Manager
Adriana Pilecky-Dekajlo	Project Manager, Ex Libris	Vendor
Jackie Crinion	Head, Acquisitions, UW Madison	Acquisitions Team Chair
Ann Hanlon	Head, Digital Collections, UW Milwaukee	Digital Team Chair
Katie Sanders	Systems Librarian, UW Colleges	Discovery Team Chair
Craig Thomas	Systems Librarian, UW Oshkosh	EResource Team Chair
Dineen Grow	Head, Access Services, UW Madison	Fulfillment/ILL Team Chair
Susan Foran	Team Leader, Resource Discovery, UW Milwaukee	Resource Mgt. Team Chair
Bruce Barton	Head, Shared Development Group, UW Madison	Technical/Data Team Chair
Campus Representatives	All Campuses	Campus Representatives

Steering Committee

Committee Member	Title	Project Roles
Paula Ganyard	Library Director, UW Green Bay	<ul style="list-style-type: none"> • Consortium policy decisions • Communications with CUWL • Data migration oversight • Budget management
Lee Konrad	Associate University Librarian, UW Madison Libraries	
Jim Lowrey	Assistant Director of Libraries, UW Milwaukee	
Mitch Lundquist	Manager, Computer Operations, UW Madison LTG	
Susan Mitchell	Library Consultant, UW System Administration	

Schedule

Milestone	Estimated Date
Kick-off meeting	5/8/2014
Complete charter & timeline	5/21/2014
Complete project plan	6/20/2014
Data migration – initial test	Late May, 2014
Data migration – full test	August, 2014
Data migration – full cutover	January, 2014
Go-live	Early February, 2015
Post go-live consulting	February-March, 2015
Project closure & transition to support mode	4/1/2015

Budget Estimate

Item/Service	Cost Estimate	Funding Source
Fiscal 2014 Budget Impact	\$528,450	UW System Administration
Fiscal 2015 Budget Impact	\$1,442,360	UW System Administration