

When Does Twenty-Three Equal One?

The Quest for a Truly Unified Library Management System
in the California State University System

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California State University: The Facts

- 23 CSU campuses
- Range from large research universities to small comprehensives
- Over 450,000 current CSU students
- Over 3 million alumni
- CSU Libraries have over 21 million annual full-text downloads
- Over 1 million annual Library books circulated
- Over 26 million Library volumes held
- Cumulative annual Library budget: \$108 million
- Library Professional and support staff: 1330

What is the ULMS?

ULMS stands for **U**nified **L**ibrary **M**anagement **S**ystem.

At the heart of the ULMS is the idea that a 23 campus integrated library system, on a next generation digital platform, has more efficiency, better resource sharing potential, and enhanced information discovery capabilities than the single campus model that we've all used for the past 25 years.

Other nomenclature:

- Shared Inter-Library Services (Orbis Cascade)
- Unified Library Services Platform (University of Wisconsin)

Why the ULMS? What's the Problem?

Money

- Individual contracts with multiple disparate vendors cost more
- Some campuses face cost/staffing barriers to implement new systems
- Productivity costs are higher in separate systems from duplication of effort
- Our current systems are now “legacy systems” (which cost more to maintain)

Why the ULMS? What are the Benefits?

Benefits for end users (CSU students and faculty):

- Aid in discovery: One search tool across resources, including digital archives and other assets
- Unite resources: Ready access to CSU-wide holdings
- Empower analytics: Potential for additional indexed content in discovery
- Potential for new services, such as more efficient resource sharing
- Ensure equity across the CSU system
- Simplified workflows

Why the ULMS? What are the Benefits?

Benefits for library staff & librarians:

- More efficiencies and collaboration among CSUs
- Consortium-wide functionality
- Better collection choices
- Improved analytics and data access: share and compare user data
- Data-driven decision making
- Improved integration with third-party systems (e.g., PeopleSoft)
- Less fragmented systems and approaches
- Less downtime for software updates; more frequent updates with new features

ULMS Timeline: Pre-2012

- Many vendors announce “next-gen” ILS systems to replace current offerings
- Older ILS approach “end-of-life” support status
- LIB-IT and STIM identify a shared ILS system as a top strategic direction for the CSU

ULMS Timeline: 2012-2013

- ULMS **idea** is presented to COLD (CSU Council of Library Deans) (December 2012)
- Formal proposal of the ULMS **project** to COLD (April 2013)
- ULMS becomes a priority on the 2013-14 COLD agenda
- Informational conference call with Orbis Cascade (Fall 2013)
- Vendor showcases at three campuses (Fall 2013)
- RFP working groups formed (Fall 2013)
- Project website created (Fall 2013)
- COLD unanimously approves the ULMS (November 2013)

ULMS Timeline (2014-2015)

- 2014: Ambassadors tour CSU campuses with “the vision”
- 2014: RFP drafted
- 2014: Vendors submit written responses
- 2014: Written responses evaluated
- 2014: In-person demos
- 2015: Successful vendor selected by committee and ratified by COLD
- 2015: Negotiations with Ex Libris, and the contract is signed
- 2015: Implementation begins

ULMS Timeline (2015)

- 2015: ULMS Project Kickoff meeting
 - Ex Libris Overview
 - Project Management Bookcamp
- 2015: Monthly Webinars and training sessions begin
- 2015: Vanguard Phase begins
- 2016: Other campuses begin implementation

RFP Requirements (issued in Fall 2014)

- Be fully developed and operational for managing both print and electronic resources
- Hosted in the Cloud, with the highest levels of reliability and scalability
- Support consortium functionality for print and electronic resource management, analytics, and discovery
- Allow campuses to administer their collections individually, if desired
- Provide a fully integrated suite of modules, and allow for integration with other third-party systems such as PeopleSoft, Link+, and ASRS systems
- Support resource sharing throughout the CSU
- Provide a complete set of analytical tools to support evidence-based decision making
- Facilitate discovery of all CSU print and electronic resources

Evaluation Committee (2014-2015)

- Made up of ten representatives from CSU libraries and the Chancellor's Office
- Evaluated six responses to the RFP
- Invited five vendors to offer webinars and in-person demonstrations
 - Several hundred CSU library staff viewed the discovery webinars in February 2015
 - Nearly one hundred staff from all campuses attended the in-person staff functions demonstrations in Long Beach in March 2015
- Evaluation committee determined that only two vendors met the RFP requirements

Negotiation Committee (Spring 2015)

- Comprised of CO staff and COLD representatives
- Finalized the total cost to the CSU
- Negotiated terms of the contract
- Secured answers to issues that came up in the evaluation process as well as other questions that emerged through negotiations and talks with other Alma customers



Cost of the ULMS

- Chancellor's Office pays \$1 million for migration costs
 - Hiring of ULMS staff at the Chancellor's Office
 - Travel funding: training for campus libraries
 - Other migration costs
- Each campus pays their own annual maintenance costs
 - Some pay a bit more, but most pay **a lot less** than with their previous vendors
 - Chancellor's Office will contribute \$200,000 annually
 - New total cumulative annual spend is \$1.4 million
 - Total annual savings is almost \$750,000 when compared to current spend

Why Ex Libris and Alma?

- Ex Libris seems to have a vision for the future
- Ex Libris has positioned Alma as the system best able to meet the current and forecast needs of the CSU
- Ex Libris provides the most comprehensive consortial support
- Ex Libris has proven strength in electronic resource management
- Alma is a powerful and flexible system
- Alma can centralize many functional tasks
- Alma allows the CSU to develop collaborative workflows among the campuses, particularly in cataloging and collection assessment

What does the ULMS include?

 <p>Alma Library Services Platform and Application Programming Interfaces (APIs) (Back-End Staff View)</p>	<p>Cloud-hosted, browser-based:</p> <ul style="list-style-type: none">• Circulation & Course Reserves• Acquisitions• Cataloging• Electronic Resource Management (ERM)• OpenURL Link Resolver• ASRS Interoperability
 <p>Primo Discovery Service and Application Programming Interface (API) (Front-End User Interface)</p>	<ul style="list-style-type: none">• Search Engine (Books, Articles, Journals, Holdings, Course Reserves etc.)• My Library Account

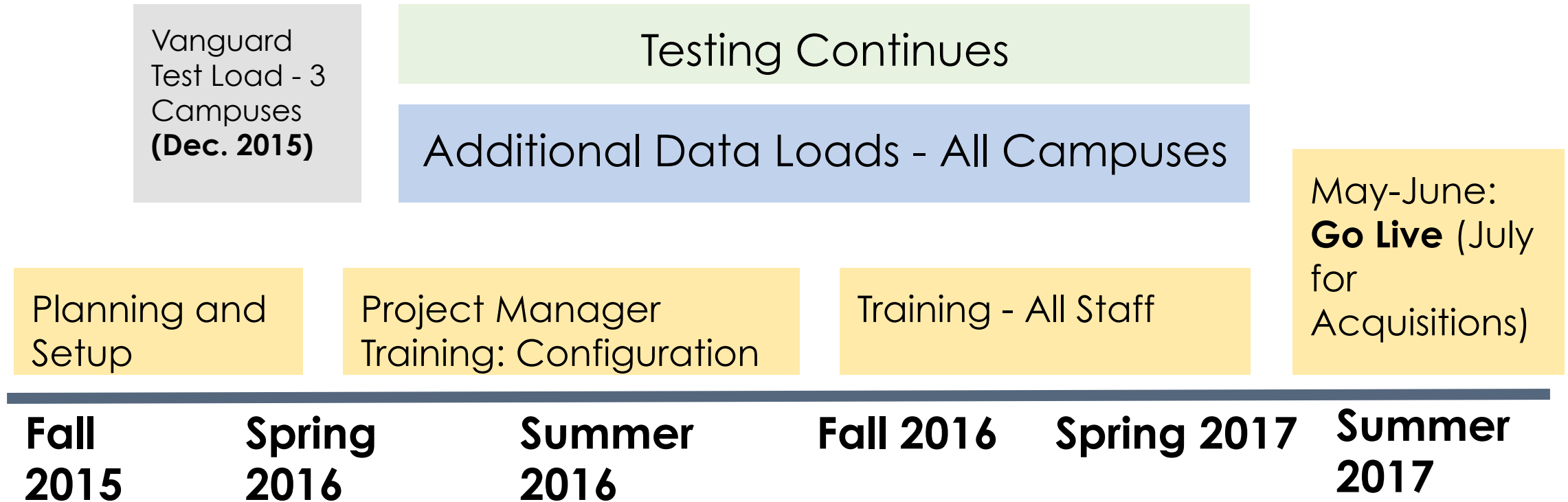
What is Going Away?

Going Away	Replaced By
Millennium (Cataloging, Acquisitions, Electronic Resource Management, Circulation, Statistics, Course Reserves processing)	Alma
Online Catalog (suncat.csun.edu)	Primo
OneSearch (Xerxes / Summon API)	Primo
SFX ('Find Text' Link Resolver)	Alma Link Resolver

What ISN'T going away?

- **ILLiad** (Inter-Library Loan Software)
- **ASRS** system
- **EZProxy** (Off-campus authentication system)
- **ContentDM** (Digital Library / Archives)
- **DSpace** (ScholarWorks – Consortium Hosted)
- **VideoFurnace** (Streaming Video)
- **Drupal** (Library website)
- **Archon** (FindingAids)
- **Databases A-Z and Databases by Subject** (potentially)

What is the timeline?

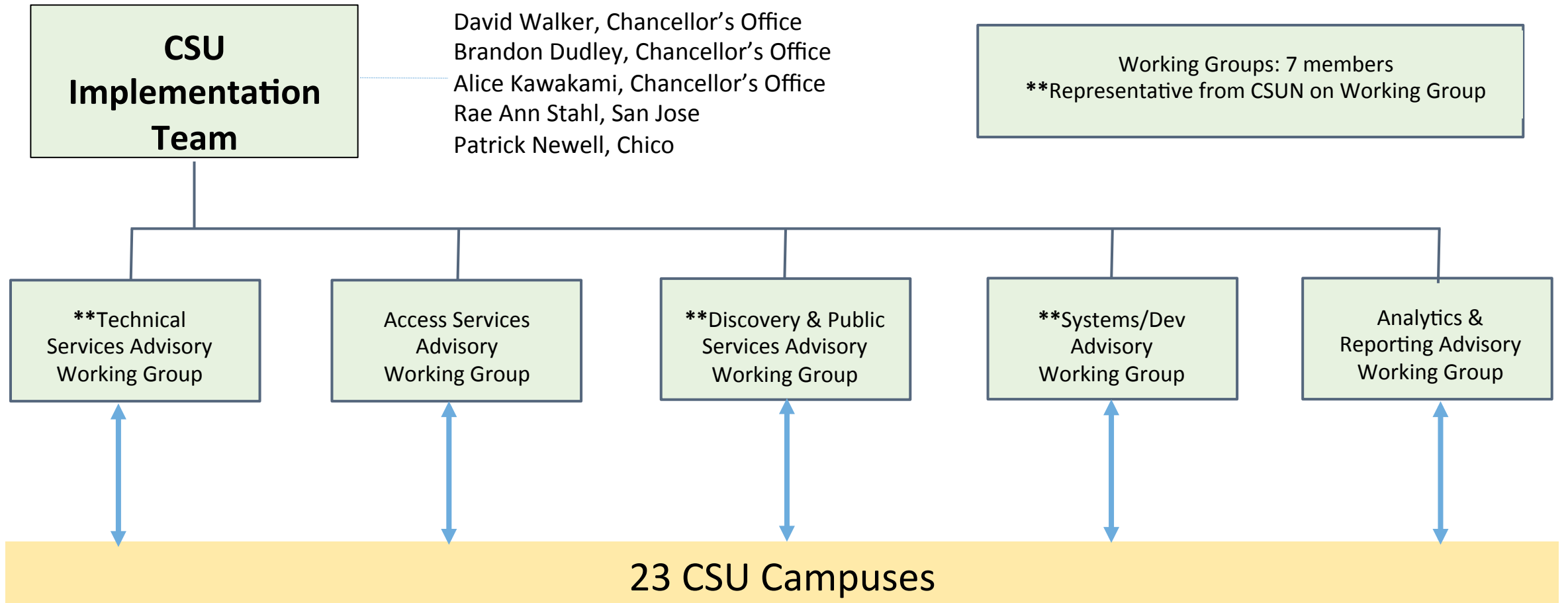


The “Single Cohort Model”:
all 23 campuses migrate together, not in phases.

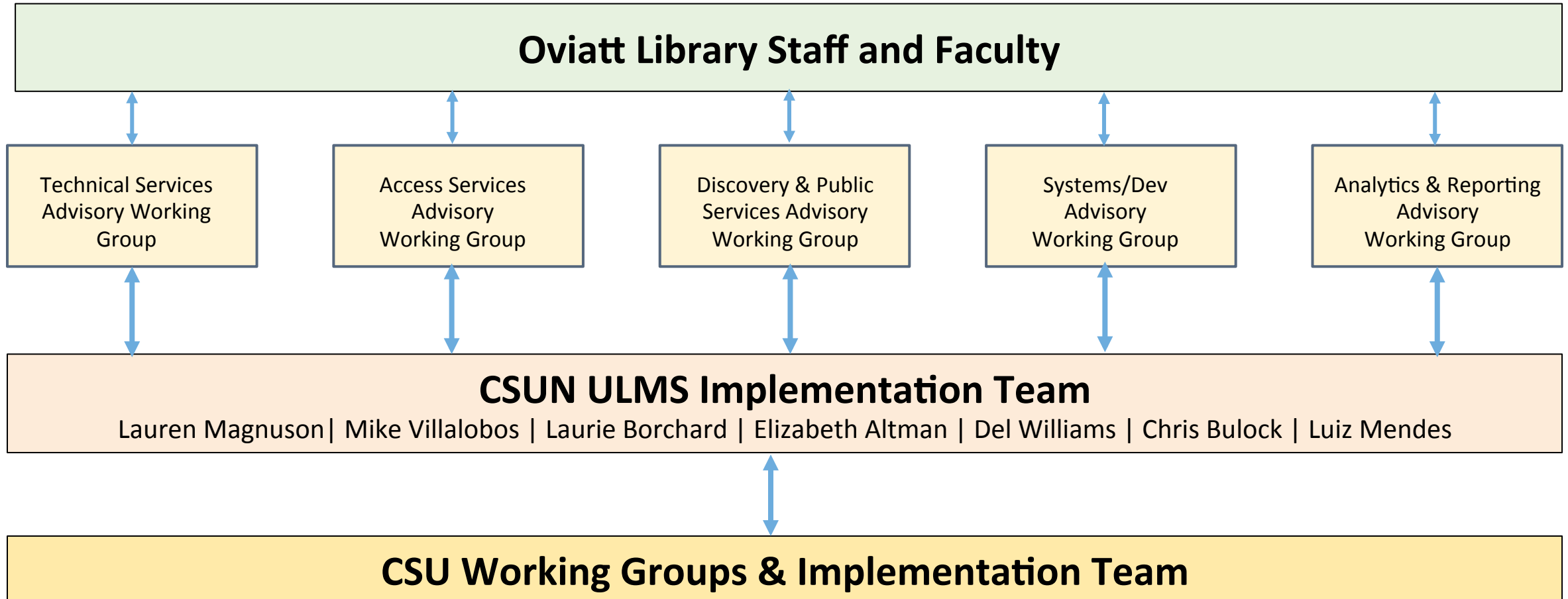
Why the “Single Cohort”?

- All CSUs benefit from time and experience with the system
- Almost a year to experiment with the system before go-live date
- This is ExLibris’ preferred method for migrating large consortia

CSU-Wide ULMS Governance Structure



CSUN LOCAL ULMS Project Structure



How is the Chancellor's Office involved?

- Funding for initial implementation costs
- CO staff involvement with CSU-wide “Governance Committee”
- Project manager for ULMS (Brandon Dudley, formerly @ CSU Sonoma)

How is the Chancellor's Office involved? Cont'd.

- Staff to assist with data migration and project management (new, 2-year positions):
 - Manager for Library Workflow Processes
 - Manager for Library Data Migration
- Communication with peers (e.g., Orbis Cascade)

Who is going to make decisions?

CSU-Wide:

**CSU Implementation Team
and working groups**

*Governance structure for
some CSU-wide decisions
involving shared functionality*

Local Campus:

**CSUN ULMS Implementation
Team and working groups**

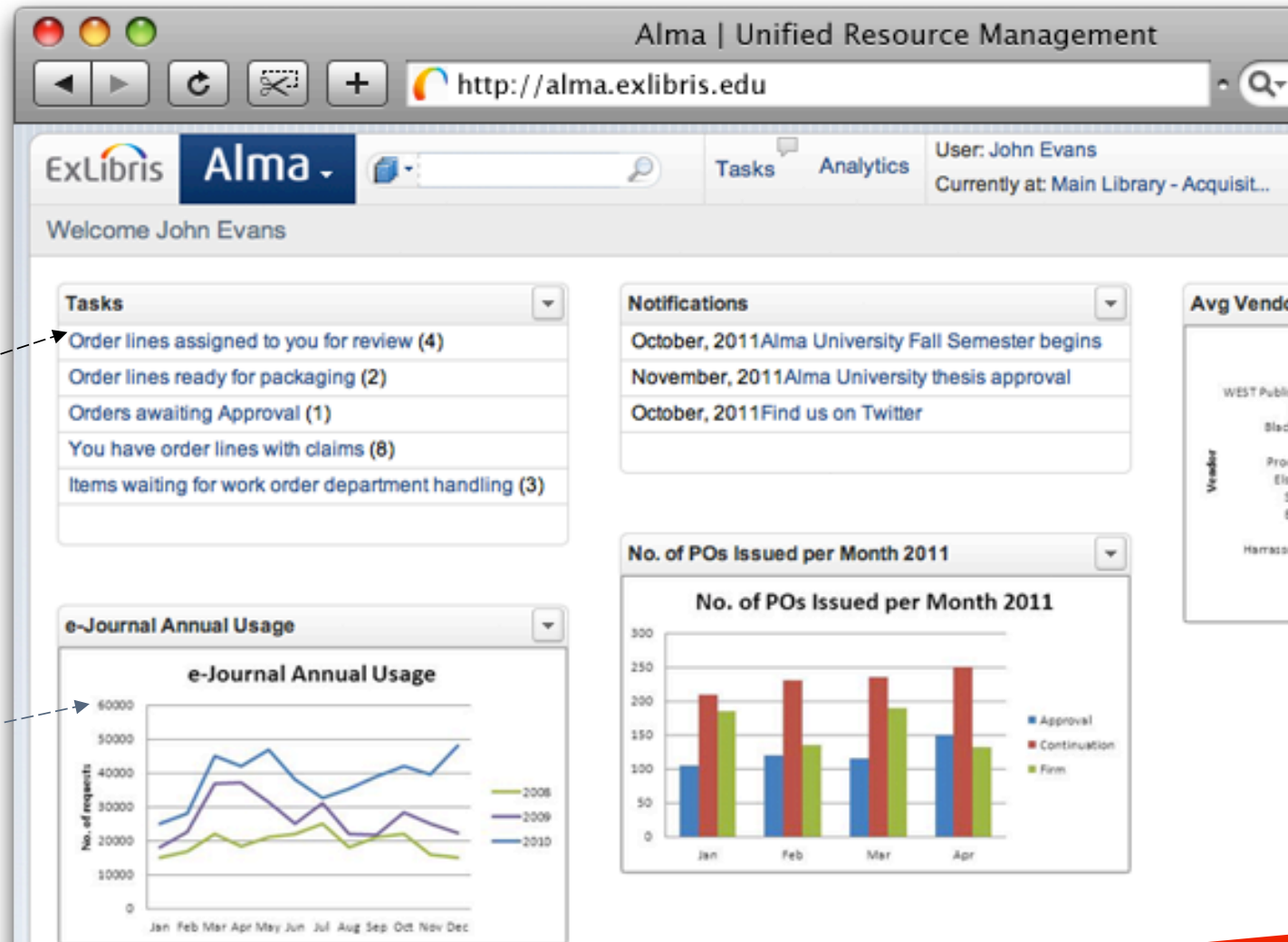
*Will consult with and
communicate with all Oviatt
staff and faculty, as well as
consult with the CSU-wide
Implementation Team.*

**All Oviatt staff and faculty will
be included in decision-
making for their functional
areas.**

What are the migration challenges?

- Learning curve
- Managing expectations / emotions
- Data issues during migration
- Rethinking current workflows and workarounds
- No real-time updates from Alma > Primo
- Integration with ASRS

What does Alma look like?



Browser-Based (works on iPads & tablets)

Task / Workflow Assignment

Auto-Populating Statistics

How do we prepare for implementation?

- Decide what to migrate
 - Example: there may be old, outdated data or records in Millennium that do not need to be migrated
- Cleanup data
 - Example: checking for OCLC Numbers in records
- Document workflows
 - It will be helpful to document the **goals** of regular workflows, **not the procedures**

How will Millennium data be preserved?

- Data will be exported and preserved (as spreadsheets in many cases) during migration for future reference.
- The CSUN Project Manager and Working Groups will work with faculty and staff to identify data for preservation.

Training?

- Online and in-person training by Ex Libris
 - Online training via ExLibris-created videos(starting in October 2015 and available on-demand. No login required.)
 - “Alma Certification” for system managers
 - Weekly Q&A sessions with project managers across CSU
 - In-person training August 2016 and January 2017
 - Two 3-day in-person Alma workshops

What other resources are available?

- Ex Libris / CSU / Local Community resources
 - CSUN ULMS Blog
 - CSU Project Management Site (Confluence)
 - CSU Functional Areas Listservs
 - Primo Listserv
 - Alma Listserv
 - ELUNA (Ex Libris Users of North America)

How will jobs change?

- More inter-departmental collaboration in the library
- More opportunity for collaboration with other CSU staff
- More opportunities for cross-training
- More time devoted to training and implementation of the new system
- Opportunity to fix workarounds and solve old problems

How will staff have time for the migration?

- Each staff supervisor will work with each employee affected by the migration to help prioritize and organize his or her time as we transition from Innovative to Ex Libris.
- While local processes will vary from campus to campus, it is possible that the CSU systemwide working groups may make recommendations to the campuses in regard to some suggested ways to handle what we might call “parallel work flows” during migration.

What are the future possibilities?

- Future consortial resource sharing (print and electronic)
- Improved services for distance students
- Greater flexibility and extensibility enabling us to prepare for future data structures and systems

Advice from another consortium

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

Questions?

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