Cal State
Alma Primo Implementation

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Goals

- What problem were we trying to solve?
- Why Alma and Primo were the best option
- Some of the mechanics of the process
- Answers to specific questions from you all

Project timeline overview

2013	Building the case
2014-15	RFP
2015-17	Implementation
June 2017	Go live

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Step 1: Why did we do this?

California State University

23	campuses
1	central office
437,000	students
44,000	faculty and staff
25 million	titles held
$5 million	electronic core collection
$10 million	opt-in content

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ILS Systems

- Sierra
- Millennium
- Voyager
- Alma

ERM Systems

- Innovative
- SerSol
- Verde
- Alma
- None

Link Resolver

	SFX
	SerSol
	Alma

Discovery

SerSol

Innovative

Ebsco

Primo
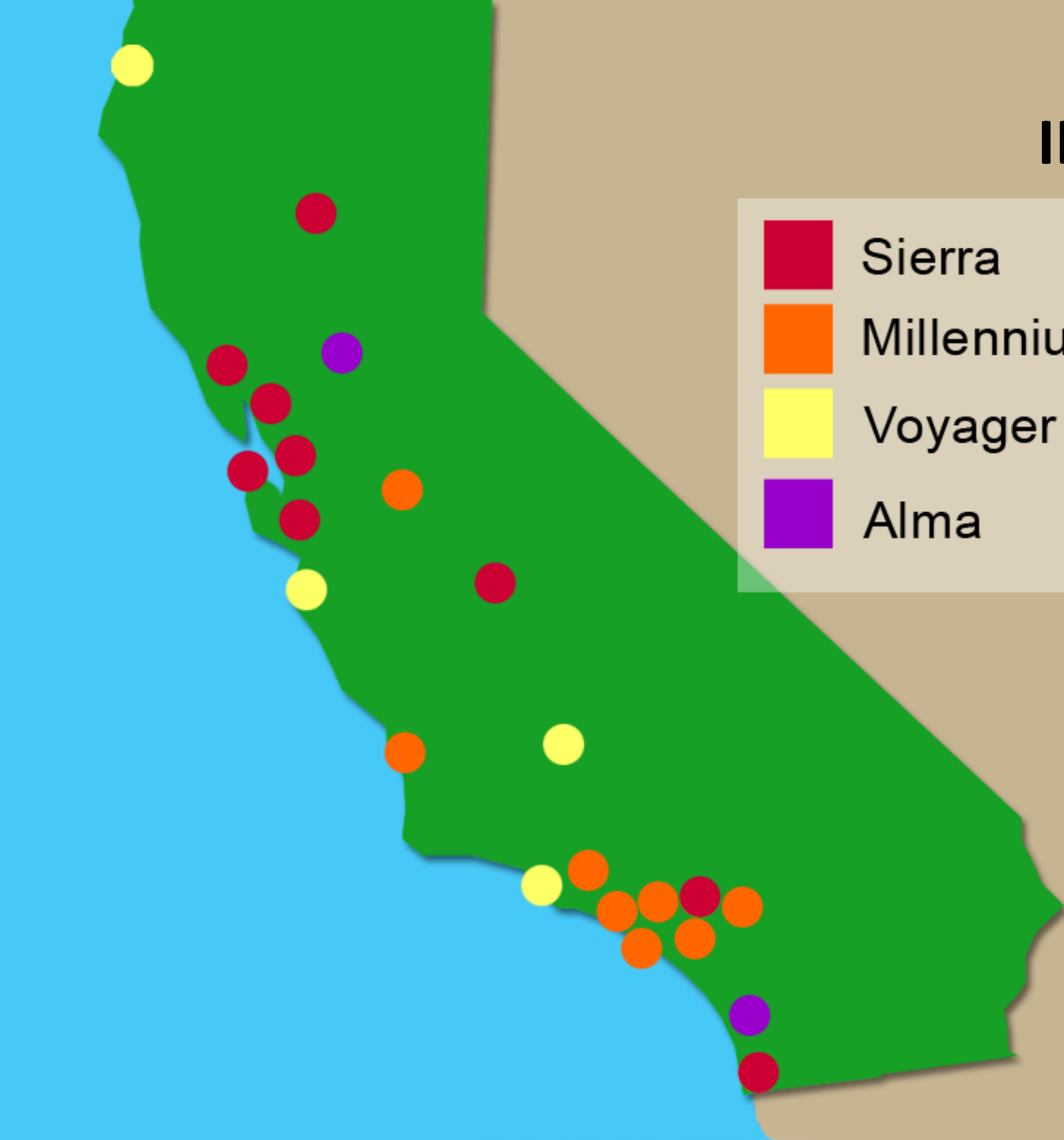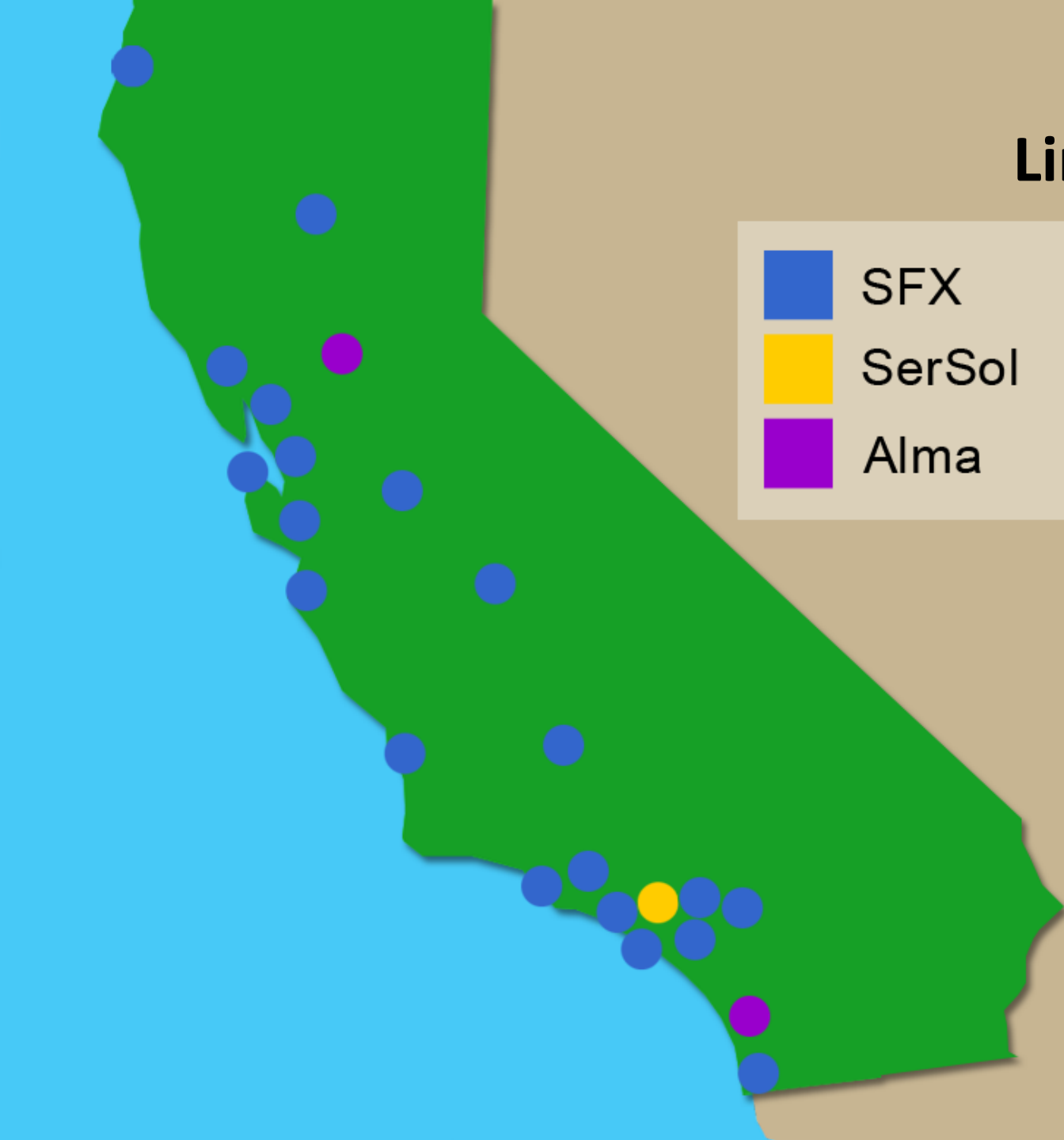
Why was that a problem?

No system-wide technology strategy

- Central and local decisions not coordinated
- Different vendors
- Incompatible systems
- Inefficient, redundant workflows
- Extra costs

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Toward a unified system

- Bring every campus onto a single vendor platform
- Manage electronic and print materials in a single system

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Additional opportunities

- Negotiate together to achieve discounts
- Centralize some tasks, collaborate on others
- Work together to solve issues that plague all campuses
- Achieve goals that require shared data, functionality
- New opportunities in collection development, services, etc.

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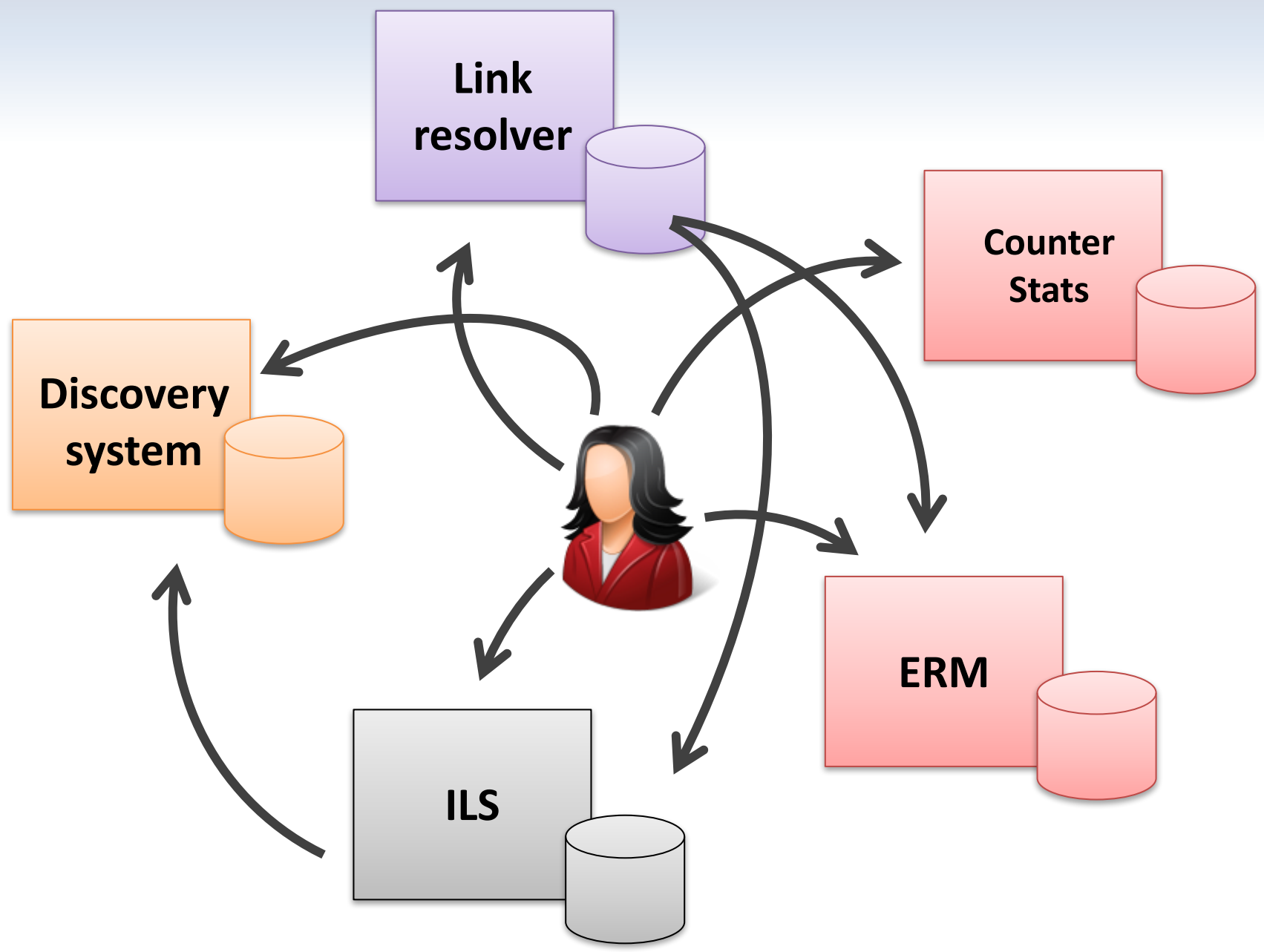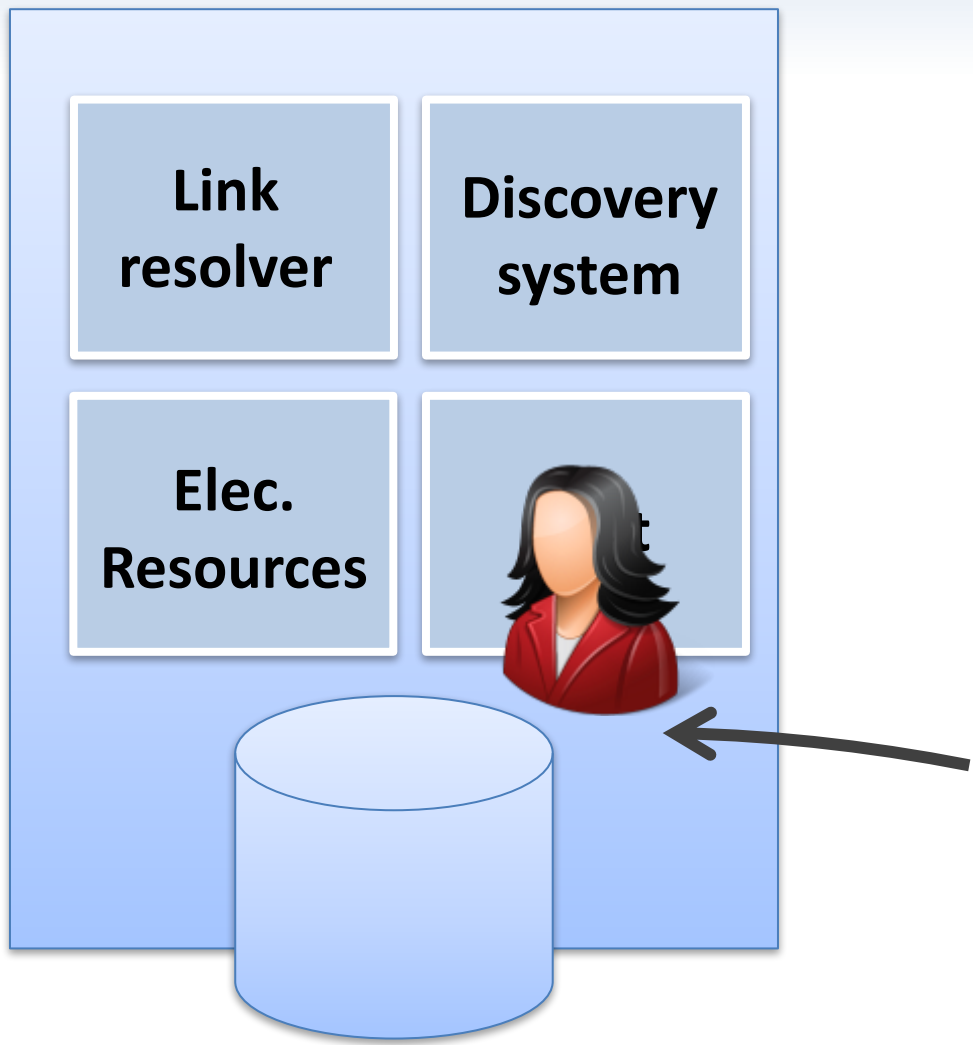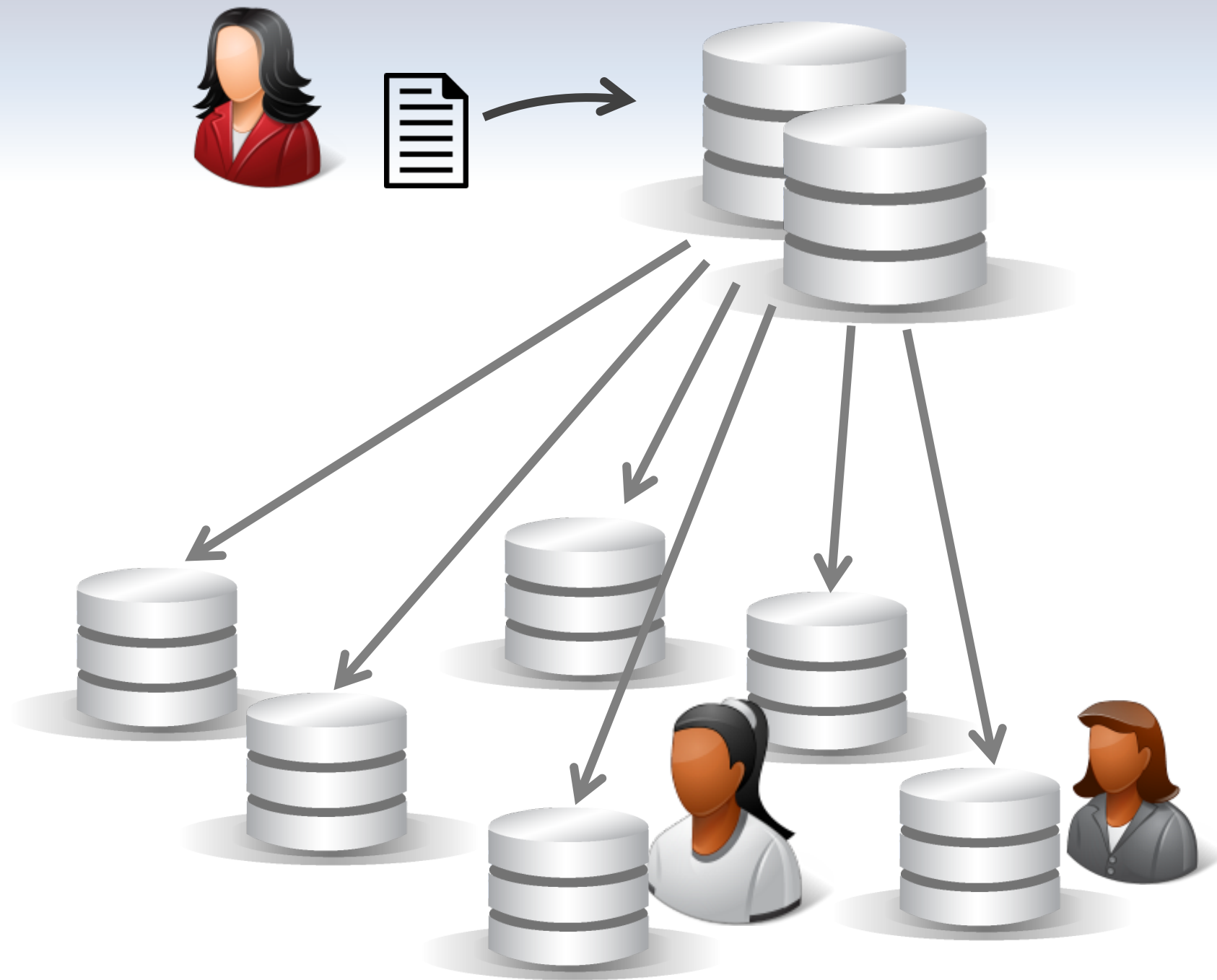
What does collaboration mean?

- Centralized e-resource management
- Collaborative cataloging
- System-wide analytics
- Collaborative collection development
- Better ERP system (= PeopleSoft) integration
- Collaborative application development
- Resource sharing

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Timeline (Pre-RFP)

Fall 2012	Presentation to directors
Spring 2013	Presentation to staff
Fall 2013	Vendor demos
Spring 2014	Cost analysis
	Writing RFP
Summer 2014	Campus visits

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Step 2: RFP

RFP

- Steering committee oversaw process
- Five subcommittees focused on functional areas
- Got feedback from broad spectrum of staff

RFP (cont'd)

- Used Orbis Cascade RFP as a starting point
- Changes
  - Greater emphasis on e-resources, analytics
  - Less emphasis on vendor tech. infrastructure
  - Added concerns to satisfy various interests
- Two scopes of work
  - Management functionality
  - Discovery & user experience

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Timeline (RFP)

Fall 2014   RFP released

Written responses evaluated

Spring 2015   Product demos evaluated

Step 3: Selection

Formal evaluation team

- Members of steering committee (incl. 3 library deans)
- Chairs of RFP subcommittees
- Provide recommendation to Library deans (COLD)

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Vendor presentations

- Invited front-runners for all-day product demonstrations
    - 130 CSU administrators, librarians, and staff in attendance
    - Gathered feedback from attendees
- RFP Evaluation committee
    - Scored written RFP responses and presentations
    - Incorporated attendee feedback

Management functions

Area of Evaluation	Written	Demo	Total
Consortium functionality	30	60	90
Handling of Electronic Resources	50	90	140
Handling of Physical Resources	30	50	80
Systems & Services	100		100
Acquisitions, Cataloging, Licensing	60	110	170
Analytics	40	70	110
Circulation	40	70	110
Cost			200

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Discovery

Area of Evaluation	Written	Demo	Total
Systems & Services	30		30
Integration with management system	70		70
Discovery & User Experience	100	200	300
Cost			100

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Ex Libris

Strengths

- Strong in all areas
- Consortium capabilities
- E-resources management
- Third-party systems integrations

Weaknesses

- User interface
- Some print mgmt. features
- Primo article/database coverage

Innovative

Strengths

- Print Management
- Circulation
- Resource Sharing

Weaknesses

- Proven consortium capabilities
- E-resources management
- Third-party integrations / APIs

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OCLC

Strengths

- Cataloging
- Print serials
- Good in many areas

Weaknesses

- Acquisitions
- Analytics
- Batch functionality
- Discovery print focused

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Also rans

- SirsiDynix
- Intota
- Ebsco (Discovery only)

Step 4: Implementation

Implementation overview

June 2015	Contract signed
Summer 2015	Planning
Fall 2015	Data clean-up
Spring 2016	Test migration, configuration
Summer-Fall 2016	Testing, training
Spring 2017	Final migration
June 2017	Go Live!

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Responses to questions

Q: Challenges at local colleges?

- Local procedures vs. *standardization*
- People need to do their day jobs
- Training at the local level
- Coordinating activities with local departments
  - Campus IT
  - Fiscal offices
- Integration w/ local systems

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Q: How have you set up support?

- Central positions
  - Admin, vendor relations
  - ERM
  - Resource sharing
  - Discovery / systems
  - Temp. implementation support
- Local library systems staff

- Governance committees
- Vendor support
  - Tech support
  - Customer satisfaction

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Q: What is the team structure and how are campuses represented?

- Implementation team
  - *CO + campus reps*
- Working groups
  - *Campus staff with focus on functional areas*
- Taskforces
  - *Campus staff with focus on specific issues*
  - *Best people, no premium on equal representation*

- COLD
  - *Library deans, focus on policy approval and strategic direction*

- Vendor project management

Q: How customizable is the catalog?

- Cataloging
  - Master record, local extensions possible
  - Workflow customization possible, standardization encouraged
- Discovery
  - Centralized normalization of catalog records
  - Local: interface, scopes, facets
  - Local: article databases, collections
  - Local: harvesting of digital collections (ContentDM, IR)

Q: Lessons learned - what should we avoid?

- Shorter, simpler RFP
  - Discovery/Management one scope of work
  - Simplify scoring
- Greater coordination of local training
- Need to make decisions before you have full knowledge
  - Discovery design decisions
  - Cataloging, acquisitions workflows

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Communication overhead

- Gather information on local practices as soon as you can
- Clearly articulate how the new system will be used as soon as possible
- Identify friction areas and develop strategies to reduce

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Q: What were the surprises?

- Data de-duplication from multiple sources
  - OCLC, local bib, e-resources
- Everything takes longer than expected
  - Especially for campus IT
- Switch in ExL PM
- Ancillary costs
- People are resilient

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