**Cal State Alma Primo Implementation Notes – May 23, 2017**

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Based at the CSU Chancellor’s Office (working remotely). Similar organizational structure except they do have some centrally managed library services. Working groups are open and inclusive. Philosophy of keeping the doors open and invite participation to ensure shared understanding of project.

**Overview**: 4 years. 2013 to 2017. Go Live in June 2017.

**What Problems trying to solve**

* Different Vendors: 4 ILS systems, 5 different ERM systems, 3 different link resolvers, 4 different discovery systems across 23 campuses
* No system-wide technology strategy. Central and local decisions not coordinated; different vendors; incompatible systems; inefficient; costly and redundant.
* Objectives: create greater efficiencies; create different opportunities. Negotiate to achieve deep discounts; centralize some tasks; collaborate on others; formulate goals that require shared data an functionality. Create integrated system that eliminates redundancy of managing disparate systems.
* Efficiencies of scale through centralization and some shared systems. Collaborative capabilities: Centralized e-resource management. Load data once instead of 23 times. Collaborative cataloging.

**RFP Process:** Orbis Cascade RFP as model. But solicited input from libraries to inform RFP development. Wanted to make sure people knew would be involvement, share concerns, intercept some of the misconceptions early on.

Changes: greater emphasis on e-resources and analytics; less emphasis on vendor tech and infrastructure. Structure of RFP was to create two scopes of work: 1) management functionality and 2) discovery/user experience. Treated evaluation functionality separately. Feedback: In retrospect, not the best approach.

**Timeline:** 9 months between **release** of RFP and recommendation of selection.

Six responses. Vendor presentations made to evaluation teams. Scoring matrix used for evaluations.

**Alma**

* Ex Libris new system built from scratch. Strengths: consortium capabilities, e-resource management, 3rd party integrations. Weaknesses: user interface, some print management features; primo article/database coverage.
* Observation: desirability of flexible and complex design brings challenges to user interface. Seeing improvements in UX post ProQuest merger.

**Sierra**

* Innovative: Sierra is reworking of Millenium. Strengths: print management, circulation, resource sharing. Weaknesses: proven consortium capabilities, e-resource management and 3rd party integrations, APIs

**WMS**

* Strengths: Recent architecture; cataloging; print srials; good in many areas. Weaknesses: acquisitions, analytics, batch functionality, discovery is print focused.

SirsiDynix, Intota, EBSCO (Discovery only) also responded but did not meet all requirements. EBSCO could not show ability to integrate into management functionality.

**Mechanics.** Implementation: June 2015- June 2017

Central office: 11 or 12 employees. Did you hire an outside professional? Brought in Marshall Breeding to help a little bit with the RFP and the staff hired to help with the migration. 4 or 5 people dedicated to the project solely.

Data clean-up, test migration and configuration, testing and training, final migration. Go Live is three groups in three weeks.

**Challenges at local colleges:**

* Local procedures vs standardization.
* Competition for staff time vis a vis ongoing day jobs
* Training
* Coordinating activities with local departments, such as Campus IT
* Integration with local systems

Ex Libris has train the trainer model. Disconnect between knowledge given to trainers and deploying that knowledge is a challenge.

**Cost and Resource Dispersion**

Chancellor’s office paid all implementation costs. Money not given to the campuses directly but staff training and support available for each campus.

**What about Alma did you consider to be better than Voyager/Primo?**

* All systems have some problems, but are different problems. Assessed strengths and how they relate to what you are looking for. Alma new, built completely from scratch. Compared to Voyager, which is very old. CSUs were heavily Innovative – thought would continue in that vein, so was a bit of a surprise to end up with Ex Libris, but let the scoring speak in the process rather than let previous vendor experience color decision.
* Ex Libris documentation available to anyone (no login required) for Alma.
* Largely happy with Ex Libris (when asked about degree of happiness with vendor and product). Don’t overpromise, meet metrics on time, worldwide audience perspective.
* Deciding priorities at the campus level, informed evaluation process because needs articulated as a group.
* Decision to be as objective as possible with the scoring allowed for consensus. And help avoid perception of bias.

**How handle catastrophe that might occur when launch live?** Make priorities known to Ex Libris and put them on their development process. How often does Ex Libris do upgrades? Monthly. Ex Libris has large consortia base – attractive in decision making.

**How have you set up support?**

* Central positions: 1) admin and vendor relations, 2) ERM, 3) resource sharing 4) discovery 5) implementation support (temporary)
* Local library systems staff
* Governance committees – create policy decisions once go live. Make decisions regarding ongoing growth models.
* Vendor support: tech support, customer satisfaction

Concerns voiced by CCL librarians about support, staffing, assistance.

**Team structure:** 1) implementation teams, 2) working groups 3) taskforces, 4) Council of Library Deans - operational decision making in the hands of the librarians and staff; other decisions made by library leadership.

**Questions**

**How did smaller colleges manage staffing and lack thereof?** Most have done the migration with the staff on hand and no new staff. However, temporary migration support has spent more time with smaller campuses. Don’t underestimate consortia functions. Enables one person to make the change for all

**Impact of purchase of Ex Libris by ProQuest during implementation:** No changes other than good – bringing features from Serials Solution into Alma.

Questions about customization of catalog: cataloging and discovery both customizable.

Standardization questions: decided to standardize on EZProxy for authentication.

Question about indexing wars: Put language in the contract but not able to really enforce. What problems has it created? ProQuest not directly indexing EBSCO content but are indexing and providing partial coverage through other data sets. Primo gives opportunity to add EBSCO results into the search. However is still not an equal experience and is still a problem.

**What should you avoid – Lessons learned**

* Shorter, simpler RFP. See Wisconsin RFP model as simpler alternate
* Discovery and Management in one scope of work
* Simplify scoring
* Greater coordination of local training
* Avoid making decksions before you have full knowledge
	+ Discovery design decisions
	+ Cataloging and acquisitions workflows
* Take more into account – communication. Gather information on local practices as soon as possible. Ability to describe practices and exceptions to practices would allow to develop strategies proactively

**Surprises**

* Data de-duplication from multiple sources
* Everything takes longer than expected. Could have used the time better.
* Ancillary costs
* Created a change management person/position to ease staff concerns, communicate. But “there were none”. People felt their concerns were heard and people were more ready for this than they may have expected.