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
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
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
Toward a unified system

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

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<tr>
<th>Area of Evaluation</th>
<th>Written</th>
<th>Demo</th>
<th>Total</th>
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<tr>
<td>Consortium functionality</td>
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<td>60</td>
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<td>Handling of Electronic Resources</td>
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<td>Handling of Physical Resources</td>
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<td>Systems &amp; Services</td>
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<tr>
<td>Acquisitions, Cataloging, Licensing</td>
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<td>Analytics</td>
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<td>Circulation</td>
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<td>Cost</td>
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## Discovery

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<td>Systems &amp; Services</td>
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<tr>
<td><strong>Integration with management system</strong></td>
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<tr>
<td>Discovery &amp; User Experience</td>
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<td>300</td>
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<tr>
<td>Cost</td>
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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
OCLC

Strengths
• Cataloging
• Print serials
• Good in many areas

Weaknesses
• Acquisitions
• Analytics
• Batch functionality
• Discovery print focused
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!
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
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
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
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
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