Project Closeout Report
Presented to the IT Committee November 4, 2020

Project Name: Library Services Platform for ODIN Academic Libraries

Institution: North Dakota University Systems

Business Unit/Program Area: ODIN-Academic

Project Sponsor: Jerry Rostad | Ellen Kotrba

Project Manager: Joe Tillman

Objectives		
	Measurements	
Project Objectives	**Met/ Not Met**	**Description**
Objective 1.1: Configure LSP to allow users to easily search, view, check-out and reserve library materials from their own library as well as other libraries within the consortium (pending individual library policy)	Met	**Measurement 1.1.1:** LSP users can search licensed electronic library materials in their own library. Licensing agreements do not allow patrons to search/view/checkout electronic materials that aren't licensed at their own library, except for statewide resources.
	Met	**Measurement 1.1.2:** LSP users can view licensed electronic library materials from their own library.
	Met	**Measurement 1.1.3:** LSP users can check-out licensed electronic library materials from their own library.
	Met	**Measurement 1.1.4:** LSP users can reserve licensed electronic library materials from their own library.
	Met	**Anticipated Benefit(s):** Allows LSP users within the consortium to have access to licensed electronic materials enabling for a better learning experience within NDUS
Objective 2.1: Design, Configure and Implement an LSP that enables library admin (staff) the ability to easily manage and grow library resources	Met	**Measurement 2.1.1:** Library Admins (staff) have the ability to easily manage library resources used by students and faculty
	Met	**Anticipated Benefit(s):** Library admins have full control of management of library resources as well as managing users, levy fines/penalties, etc.
Objective 2.2: Configure and Implement an LSP that enables faculty to create and manage curriculum for course work and ensure they have resources available in library system	Met	**Measurement 2.2.1:** Faculty has the ability to review available library resources that students can leverage as well as work with the Administrative staff to add materials as needed throughout the course management process
	Met	**Anticipated Benefit(s):** Faculty is more aware of available resources, can customize to match curriculum and better enabled to work with Admin staff to manage library resources
Objective 2.3: Configure and Implement an LSP that enables students to easily search, view, reserve and checkout library resources	Met	**Measurement 2.3.1:** Students can search, find and use library materials both inside their 'home' library as well as others within the consortium that allows them to fulfill the obligations and assignments of course work directed by the faculty
	Met	**Anticipated Benefit(s):** Students are able to complete course work and continue lifelong learning
Objective 3.1: Provide ODIN staff with a system to easily enable them to work with library admin staff to manage library inventory, manage system settings, manage users, request changes and configure system to meet the changing needs of students	Met	**Measurement 3.1.1:** ODIN Staff is able to manage LSP, support library admin staff, and continue evolving configurations to meet the changing needs of faculty & students
	Met	**Anticipated Benefit(s):** Will give ODIN staff the ability to continually manage and maintain the LSP, improve functionality and to extend lifetime of the service to NDUS libraries
	Met	**Measurement 4.1.1:** LSP users can access electronic resources online from their personal computer (PC, MAC, Chromebook)
	Met	**Measurement 4.1.2:** LSP users can access electronic resources online from a library or school owned computer (PC, MAC, Chromebook)

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Objective 4.1: Configure a Web-based LSP that enables users the ability to access library information any time from most devices and most times	Met	Measurement 4.1.3: LSP users can access electronic resources online from their mobile device (cell phone, tablet)
	Met	Measurement 4.1.4: LSP users can access electronic resources online from a library or school owned mobile device (tablet)
	Met	Anticipated Benefit(s): Enables users to instantly search for and see the availability of library resources whenever they need
Objective 5.1: Library admin staff need to have the ability to manage library resources and add / remove resources on an as-needed basis.	Met	Measurement 5.1.1: LSP administrators are able to add virtual and digital materials to their own library inventory
	Met	Measurement 5.1.2: LSP administrators are able to remove virtual and digital materials to their own library inventory
	Met	Anticipated Benefit(s): Allows library admin staff the ability to manage library resources instantly to react to the changing needs of their constituents

Schedule Objectives

Met/ Not Met	Original Baseline Schedule (in Months)	Final Baseline Schedule (in Months)	Actual Schedule (in Months)	Variance to Original Baseline	Variance to Final Baseline
Met	24	24	24	0	0

Budget Objectives

Met/ Not Met	Original Baseline Budget	Final Baseline Budget	Actual Costs	Variance to Original Baseline	Variance to Final Baseline
Met	$823,925.00	$823,925.00	$710,839.70	13.7% Under	13.7% Under

Major Scope Changes

No major scope changes where identified through the project

Lessons Learned

- I really like that Alma is web-based. I don't need to be worrying about updating software. Alma has a regular update schedule that they publish to the sandboxes first so you can see them there. Another good thing about being web-based, you can increase the font in your browser when necessary- it was difficult and awkward to increase the font in Aleph- sometimes fields were cut off.

- I'm pretty sure the level of control ND librarians want for interlibrary loan is common. I am very surprised by how zippy Alma is a making requests go off and send and complete and disappear. I am just surprised that this is what Ex Libris came up with.

- I learned how to create import profiles for loading vendor records into Alma, and I created an import profile to use to delete expired records from Alma as well. While ODIN did this for us previously, it is labor saving for ODIN, and expedient for those of us who like to do these tasks ourselves.

- There is no such thing as *too much data clean-up* prior to a migration - I honestly had thought that NDW was in good shape regarding data clean-up prior to the data load into Alma. (Still more to be done now.)

- Implementation Process - Hours of time and frustration could have been alleviated in setting up fulfillment with better communication from those in the know regarding new University ID cards being implemented. Having no knowledge of how these cards would work with the ILS and having only garnered this knowledge from the rumor mill put us behind from the day we went live with Alma.

Success Stories

- The Primo VE discovery is a really nice looking interface. I think we all like the way records are displayed. Icons indicate the format of resources like books and articles. I like the facets. I think searching in the discovery is pretty easy, and again linking out to electronic resources is easy as well. I think students take to it very easily. They know what to click on to get the articles they want.

- The integrations with Gale and EBSCOhost databases is pretty seamless. This helps the library get the most out of database subscriptions, as they are integrated within the discovery. Again, students seem to understand how to navigate the interface to find what they want. They understand facets and where to click to get to the article.

- Cooperation among our fellow Alma libraries has been very good as well. We all seem to want the same thing (and as I said before, I think it is common, not uncommon), and we are busy testing workflows and configurations. A good interlibrary loan system saves money on purchasing little used materials and the storage of those materials.

- We have definitely pulled together as a team. It has been a great opportunity to learn different skills and cross train. It has also given us an opportunity to review and update our workflows.

- Having the entire consortium on the Alma system will greatly benefit NDSU. Since the NDSU Libraries have been on Alma since 2013, we've only been able to rely on our own staff for configuration and setup of Alma. We've put a lot of work into making this system work for us, having implemented as an early adopter, and are thrilled that the rest of the state's resources now reside in the same system – which will make keeping current with system improvements, modifications, and sharing resources a much easier thing. Overall, we've been pleased with Alma and hope the other libraries in the state come to feel as we do.