Fulfillment Team

Project Name:

Fulfillment Team

Date:

1 October 2018

Project Sponsor:

Alma Implementation Steering Committee

Project Description and Purpose:

The Fulfillment Team will be responsible for reviewing policies and procedures related to fulfillment activities, implementing the related Alma workflows and ensuring that all staff involved with fulfillment activities are trained.

Project Assumptions:

- Alma offers the opportunity for significant improvement to the user experience in managing and tracking checked out items
- Automate processes where possible; adapt to Alma workflows
- Opportunity to review and update/enhance policies and processes governing intercampus lending
- Alma workflows may necessitate policy changes

Project Scope:

This team will review the Alma fulfillment documentation to understand Alma workflows for fulfillment tasks. With that understanding, the team will review existing policies and processes and adjust data such as patron categories and loan rules to match Alma's architecture and workflows. The team will provide the necessary configuration options for fulfillment activities (e.g., "the spreadsheet,") and will coordinate and provide training to colleagues and student staff.

- Circulation
- Paging
- Course Reserves (Alma module)
- Bookings
- ILLiad / ILL integration with circulation

Project Deliverables:

Initial Project Deliverables will include:

- *Preliminary Project Plan & Milestones*
- *Preliminary schedule/timeline of activities*
- *Define roles (as needed) for team members*

- Document Sierra-to-Alma changes to user groups, user privileges, loan rules and other components needed for configuration and Alma workflows.
- Provide required configuration option information to Richard Guajardo, keeper of the spreadsheet
- Document borrowing/lending policies based on Alma workflows
- Conduct and coordinate training on Fulfillment tasks in Alma

Project Milestones:

- WBS/Project Schedule
- Stakeholder Analysis
- Fulfillment configuration options selected and transmitted
- Policies and planned workflows agreed upon and documented
- Training completed

Project Team Leader:

Lee Andrew Hilyer

Project Team Members:

David Palmer, UH-Clear Lake
Donovan Parker, UH-Downtown
Robert Clark, UH Law
Susan Ryan, UH-Main
Chris Galloway, UH-Main
Brian Franklin (Ex-officio)
Catherine Essinger (Ex-officio, representative of branch libraries)

Project Stakeholders:

- Circulation/Access Services staff (all libraries)
- Branch library staff (their needs will need to be considered by this team)
- Student circulation staff (all libraries)
- Library users (public interface)
- Other library units (all libraries) where fulfillment workflows overlap/impact theirs
    - ILLiad integration (circulation function)

Project Expenses:

Potential expenses include purchase of new/compatible barcode readers, receipt printers.

Project Approval Requirements:

Alma Implementation Steering Committee
Migration Team (for configuration option selections)

Project Start and End Dates:

November 2018 - July 2019 (allows for continuation past go-live date to address any remaining issues)

Revision History/Change Control:

Note here any substantive changes to this project charter, including names and dates where applicable.

Changes to this document or other project parameters should be submitted in writing (paper or email) to the project manager and must be approved by the Alma Steering Committee.

Issue Log/Conflict Resolution:

For continuous improvement, project leads should capture any process problems in an Issue Log for review by the Alma Steering Committee. Project managers and Steering Committee members are available to assist in resolving conflicts that may arise during project execution.

Acknowledgments:

Both the project sponsor and the project team leader should acknowledge the contents of the project charter to confirm shared understanding of responsibilities and expectations.

_____   _____   _____
[Role] / [Date]   [Role] / [Date]   [Role] / [Date]

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[1] Taken from **A Guide to the Project Management Body of Knowledge (PMBOK Guide)**, 5th Edition, p. 32.