Project Name:

Alma Implementation Steering Committee

Date:

1 October 2018

Project Sponsor:

Dean of Libraries

Project Description and Purpose:

Leading and coordinating UH's institutional effort in the implementation process of Alma from Ex Libris, the new library service platform for UH Libraries, the UH Law Library, UH Clear Lake, and UH Downtown.

Project Assumptions:

Given the capabilities of Alma, we assume that we will
- Reduce the complexities and redundancies of our current resource management systems
- Evaluate, redesign, and streamline workflows and practices
- Review staffing and responsibilities across some units
- Reduce the complexities of policy agreements with campus and system libraries

Project Scope:

The scope of the Steering Committee is to initiate the implementation process, guide efforts of internal decision making, communicate with internal and external stakeholders, establish expectations with internal and external stakeholders, serve as the primary communication channel with Ex Libris, support units through training and change management strategies, ensure successful implementation of Alma, and ensure successful launch of new workflows with Alma.

Project Deliverables:

- Ensure key stakeholders are familiar with Ex Libris documentation, procedures, and features of Alma
- Establish a project timeline
- Establish a communication strategy
- Establish a training and change management strategy

- Ensure deliverables are met as required by Ex Libris
- Establish, support, and manage project teams that will conduct the work of the implementation process
- Ensure units are prepared for post-migration hand-off

Project Outcomes:

- An integrated resource management system configured for system-wide use (except UHV)
- Reduced complexity in intra-campus policies
- Increased efficiencies in resource management workflows
- Integration with campus and 3rd party vendor systems via APIs
- Reduction in number of systems used to manage and assess resources

Project Milestones:

- Contract finalization
- Launch with Ex Libris
- Go Live with Ex Libris
- Post-migration
- Closing of steering committee and hand-off to units
- Celebration (sheet cake moment)

Project Team Leader:

John Lehner

Project Team Members:

- Nora Dethloff
- Christina Gola
- Richard Guajardo (technical lead)
- Lee Hilyer (project manager)
- Rob Spragg
- Annie Wu

Project Stakeholders:

Campus and system libraries, internal staff, end users, Ex Libris

Project Approval Requirements:

Dean German

John Lehner

Project Start and End Dates:

July 2018 - Fall 2019 [review of end date will be re-evaluated after contract finalization and go live milestones)

Approvals:

_____ _____ _____

[Role] [Role] [Role]

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.