

Resource Management Team

Project Name:

Resource Management Team

Project Sponsor:

Alma Implementation Steering Committee

Project Description and Purpose:

The Resource Management Team will be responsible for developing policies and procedures related to resource activities, implementing the related Alma workflows and ensuring that all staff involved with resource management activities are trained.

Project Assumptions:

- Alma offers the opportunity for significant improvement and efficiency in describing and managing library resources
- Processes will be automated where possible
- Opportunity to update and develop workflows in resource description and management
- Alma workflows may necessitate policy changes

Project Scope:

The Resource Management Team will gain full understanding of the bibliographic, authority, inventory records and data in the Alma system. The team will establish and document workflows and practices for resource description and management for all formats of materials.

Project Deliverables:

Initial Project Deliverables:

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

Project Deliverables

- Document workflows and best practices for new resource description and authority control that optimize the features and functionalities of moving to Alma
- Conduct and coordinate online or hands-on training relating to Resource Management
- Identify local practices (eg., digital bookplates) that may need to continue and develop procedures for those
- Consult documentation to learn about Alma review file function
- Recommend new technology or equipment (such as label printing)
- Complete the configuration form/sheet with the Migration Team
- Identify post-migration data tasks

Project Milestones:

- Established and documented workflows and best practices
- Resource management configuration options selected and submitted
- New technology or equipment identified and implemented (where possible)
- Necessary training conducted

Project Team Leader:

Melody Condron (UHL)

Project Team Members:

Xiping Liu (UHL)

Manny Gill (UHL)

Susan Vandale (UHCL)

Marla McDaniel (UHD)

Yuxin Li (UH-Law)

Annie Wu (Ex-officio)

Richard Guajardo (Ex-officio)

Project Stakeholders:

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

Project Expenses:

Potential expenses include purchase of new/compatible barcode readers, label printing machine

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.

Alma Steering Committee

Melody Condron, PM

Approved 30 October 2018.