

ULMS Report

COLD Virtual Meeting, 6/17/21
(Wenzler, Popescu, Walker)

Topics

- Updates
- Decision: Primo VE Implementation
- Decision: Ex Libris's Rapido Proposal

Updates

- 21/22 ULMS Governance Committees appointed
 - See Brandon's message for detailed list
 - Remember that the Acquisitions Committee has been disbanded
 -
- CSU+ Due Dates
 - COVID-extended due dates ended on June 15
 - 16 week CSU+ loan period will be evaluated during 21/22
 -
- Fulfillment/Resource sharing forum on July 7. Focus on reopening. All CSU library employees welcome
- Ex Libris Contract Renewal: Adriana, John, Dave, Brandon negotiating. ExCom will approve.

Primo VE Evaluation Timeline

- **August 2020** - ULMS Discovery Functional Committee (DFC) charged with evaluating Primo VE (Gabriel Gardner, CSULB, Chair)
- **October 2020** -- Primo VE evaluation plan shared at the Discovery Open Forum
- **Jan - Mar 2021** -- DFC lead campuses through the self-switch process for a testing instance of Primo VE
- **April 2021** -- Primo VE testing month
- **May 21** -- Primo VE evaluation and recommendation sent to ULMS Steering
- **June 3** -- Primo VE recommendation sent to COLD (attached to agenda)
- **June 14-17** -- COLD Primo VE straw poll

Primo VE Recommendation

Recommendation:

“All campuses move to VE together this summer. Campuses may switch any date between July 5th and August 5th, 2021.”

Staff Concerns:

In DFC forums and surveys, a large majority of staff supported a summer migration, but a vocal minority expressed concerns about the workload of migrating this Fall as we return to campus

Support Requested by the DFC:

“A summer 2021 transition would require extensive support. Such support would need to come from their local Deans or supervisors prioritizing VE over other work, or from the Chancellor’s Office SDLC staff.”

CO Support Offered:

David Walker and Chris Lee will support campuses that need additional help in migrating

Primo VE Straw Poll

Question:

Is your campus ready to move to Primo VE between July 5 and Aug 5 as recommended by the ULMS Steering Committee?

Responses:

16 - Yes

1 - No

1 - Maybe

3 Comments:

2 of the “yes” campuses expressed concern about migrating in the summer, but were ready if they could count on adequate support from the CO. The 1 “no” campus wants to move to Primo VE in the future, but was adamant about not being ready this summer due to their return to campus preparations.

Primo VE Decision Options

Go live this Summer (1)

Pros:

- More time to road test system
- Knowledge of system fresh

Cons:

- Staff dealing with overload from repopulation tasks

Stick with the Current Primo (3)

Go live during January (2)

Pros:

- Staff can focus on reopening tasks this summer

Cons:

- Final configuration & testing in December, when otherwise busy
- Little time to road test system
- Knowledge drain from not working on VE between now and then
- Will need to upkeep both systems for six months

Rapido Background

Background

Rapido is a new Resource Sharing product developed by Ex Libris. Three CSU Libraries (Humboldt, Fullerton, Los Angeles) participated in development process. Mallory DeBartolo, the Resource Sharing Manager at the CO, served as the project manager for the CSU.

Rapido Product Development Assessment (October 2020)

The CSU Project Development Leads (Stacy Caron, Fullerton, Meghann Weldon, Humboldt, Joe Gerdeman, Los Angeles, Mallory DeBartolo, CO) wrote a detailed assessment of Rapido (<https://calstate.atlassian.net/wiki/spaces/USC/pages/2202861592/Rapido+Documents>) and gave a favorable review.

Rapido Survey Report (April 2021)

In April 2021, Chris Lee conducted a survey of CSU Resource Sharing departments regarding Rapido (<https://calstate.atlassian.net/wiki/spaces/USC/pages/2202861592/Rapido+Documents>) In general, the response to Rapido was positive.

Rapido Main Benefits

- Improves end-user experience
- Unmediated workflows speed-up requests & save staff time
- Includes RapidILL, speeding-up article requests (articles available directly from Primo w/o going to ILLiad)
- Ex Libris working on placing requests to non-Alma institutions
- Ex Libris' goal is for Rapido to eventually replace ILLiad

Rapido: Ex Libris's CSU Proposal

- If All Campuses agree to adopt Rapido in 2021/22 (John recommends adopting from May - June 2022)
- **Total CSU New Costs = \$53K** = \$132k – \$80k current spend on RapidILL

AY 21-22	AY 22-23
~\$6k (prorated) extra	~\$53k extra

- Cost reflects ~60% discount for development partnership
- Added to main ExL contract (limited to maximum 3.5% cost increase)

Support Offered by the CO

- CO (Chris & Dave) will lead systemwide project and help campuses with implementation
- CO will pay all of the increased Rapido costs in 2021/22
- CO will pay at least 50% of the Rapido costs (\$27,000) in 22/23, and likely will be able to fund the full cost that year.

2 Decisions for COLD

Decision 1:

Do we accept Ex Libris's proposal for an all in adoption of Rapido/RapidILL?

Decision 2:

If we vote yes on 1, how do we divide the campus costs?

Campus Cost Allocation Options

The Challenge:

A Rapido subscription includes RapidILL. 5 CSU campuses (Bakersfield, Channel Islands, LA, Maritime, Monterey Bay) don't have RapidILL. Their costs and potentially their benefits (getting both RapidILL and Rapido) would be higher.

Campus Cost Allocation Options

Option 1: Divide Total Rapido/Rapido Cost Equally

- Total Cost per campus = \$5,739 = $\$132,000 / 23$
- Increased cost for RapidILL Campuses = \$1,403
- Increased cost for non-RapidILL Campuses = \$5,739

Option 2: Divide Increased Costs Equally (John's suggestion)

- Increased Cost per campus = \$2,304 = $\$53,000 / 23$

Option 3: Form a Committee

- CO will cover 100% of the increased cost in 21/22 regardless and at least 50% of the 22/23 costs
- COLD uses this time for task force to determine campus cost allocations post CO subsidy.

Notes

- Campus staff are interested in moving to VE, so the decision now should be around timing
- Discovery staff have spoken (through Discovery Committee recommendation) to go now
- A reason to look into VE was to address significant negative feedback about how “Primo Classic” handles search and relevance ranking
- Little difference in Public facing UI = little adjustment for patrons
- Chancellor’s office staff time will be put towards making VE launch successful, whenever that is
- Discovery staff need dedicated/focused time towards preparing VE for use, whenever that is
- Most of the work has already been done