

California State University Unified Library Management System (ULMS)

Memorandum of Understanding: February 2017 - June 2020

The ULMS will increase the collaborative efficiency of the CSU Libraries by expanding synergies, eliminating redundancies, providing equitable access to library resources, and increasing the libraries' ability to participate in joint ventures. At the same time, the ULMS will increase the dependency of each CSU library on every other CSU library and on the Chancellor's Office for maintaining effective library services and operations.

This MOU establishes the minimum responsibilities that each member library and the Chancellor's Office commits to in order to insure the collective success of the ULMS.

1. CSU Libraries

- 1.1 Each CSU Library will pay its share of the annual ULMS systems maintenance cost according to a formula determined by the Council of Library Deans (COLD).
- 1.2 The Cost Share formula can be changed by a two-thirds vote of members present at a COLD meeting at which a quorum is present.
- 1.3 Each CSU Library shall contribute to the management of the ULMS by maintaining
 - a. Participation in the Council of Library Deans (COLD) including attendance at meetings;
 - b. Participation in ULMS governance committees pursuing strategic initiatives, including attendance at meetings;
 - c. Commitment of staff time and expertise to assist in consortial ULMS operations—including, but not limited to, joint technical services tasks such as collaborative cataloging—as determined by ULMS governance committees.
- 1.4 Each CSU Library will provide adequate support for library employees serving on governance committees or assisting with consortial operations by adjusting schedules and responsibilities so that they have time to serve in these roles and by paying training and travel costs.
- 1.5 Each CSU Library shall participate in CSU-first Interlibrary Loan (ILL) exchange with other CSU Libraries. Each library will determine and manage its own ILL solution for non-CSU libraries and materials not available within the CSU system.

2. Chancellor's Office (CO)

- 2.1 The CO will provide centralized staffing support for the ULMS under the direction of the Director of Systemwide Digital Libraries Services (SDLS) to guarantee efficient operations and to provide systems expertise. The cost of hiring, hosting, and training central ULMS staff will be paid by the CO.
- 2.2 The CO will make ULMS staffing decisions in consultation with COLD. COLD consultation would include:
- having the opportunity to discuss, at a conceptual level, new positions being added (how many, their classifications and salary ranges, what the duties are, and how they interact with existing CO staff)
 - having the opportunity to weigh in on whether these positions would be temporary or permanent at the outset in order to account for possible flexibility in job duties
 - having the ability to shape job descriptions. At a minimum, COLD would have the opportunity to respond to job descriptions before posting
 - having opportunity for a COLD member or designee member serve on the hiring committee for positions
 - requiring staff members to provide a quarterly report (or a section of Brandon's monthly ULMS update) on their progress
 - having ability to contribute to the evaluations of shared staff
 - formally dedicating a portion of its meeting annually to review the staffing configuration and recommend changes as the system evolves
- 2.3 The CO will provide staff support to the ULMS in the following areas of responsibility:
- 2.3.1 Governance and Administration
- Participate in strategic planning for the ULMS in consultation with COLD and the ULMS Governance Committees
 - Serve as the primary liaison between Ex Libris and the CSU System for strategic initiatives and for maintaining high levels of customer support and service
 - Serve as the primary liaison between CO IT and the CSU Libraries for ULMS integration projects

- Provide expertise, consultation, and implementation support to ULMS Governance committees in developing and revising policies and procedures
- Supervise, train, and support CO ULMS staff

2.3.2 Electronic Resource Coordination and Maintenance

- Activate Electronic Core Collection (ECC) and Opt-in packages purchased through the Systemwide Digital Library Content (SDLC) team
- Maintain e-resource collection titles and licenses for the ECC and Opt-ins.
- Troubleshoot OpenURL linking errors within the ULMS

2.3.3 Resource Sharing Coordination

- To effectively support Resource Sharing as indicated in this agreement, a new CO Resource Sharing position will be created and hired no later than 60 days prior to go live.
- Provide expertise and support to ULMS governance committees devoted to CSU Resource Sharing
- Implement Policies on CSU Resource Sharing adopted by COLD
- Provide training and support to campus Resource Sharing departments
- Provide analysis and analytics on Resource Sharing within the CSU

2.3.4 Discovery

- Provide expertise and support to ULMS governance committees dedicated to Discovery
- Implement systemwide search engine configuration changes and assist campuses with local configurations
- Lead and coordinate customization efforts, including third-party integrations

2.3.5 Analytics


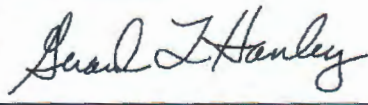
- Support ULMS governance committees and COLD by providing reports on centrally maintained CSU Library resources.
- Assist campuses with the set-up and maintenance of SUSHI harvesting.

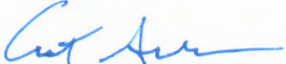

- 2.4 Other ULMS consortial activities will be presumed to be provided and supported by CSU library staff unless agreed to by COLD and CO managers and this MOU amended.
- 2.5 Other ULMS support functionality will be presumed to be provided and covered by Ex Libris support procedures under terms of the contract. CO staff will open and monitor support tickets for issues within their areas of support.
- 2.6 The Chancellor's Office will cover the cost of the courier service for CSU resource sharing – currently totaling \$262,596 annually with 2.7% inflation – allowing campuses to ship up to 100 lbs. per day.

3 Making changes to the MOU

- 3.1 COLD and the ULMS Governance Committees will engage in ongoing strategic planning and evaluation of the ULMS. Changes in contributions made by each campus to achieve strategic goals may be made with the approval of a two-thirds vote of members present at a COLD meeting at which a quorum is present.
- 3.2 Changes in the staffing levels and primary assignments for ULMS central personnel may be made by the CO in consultation with COLD.
- 3.3 The MOU covers the period of the initial contract between Ex Libris and the CSU Libraries from the 2017-18 academic year through the 2019-20 academic year. COLD will review and revise this MOU as necessary prior to the end of the contract period in June of 2020.

APPROVED:

FOR [Chancellor's Office]	
	
David Walker SDLS Manager	4/1/2017 date
	
Gerard L. Hanley, Ph.D. Assistant Vice Chancellor, ATS	4/1/2017 date

FOR [COLD]	
	07/26/2017
COLD Vice Chair	date
	4-26-17
COLD Chair	date