

# California State University

A Consolidation of  
Efficiency and Savings



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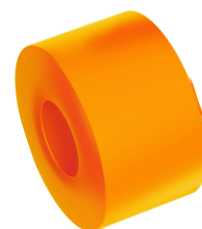
A consortium solution for centralized negotiation, acquisition and management of electronic resources.



## “Alma makes library management so easy that you can’t believe it was ever hard before.”

Jessica Hartwigsen

Library Systems Specialist at the California State University Chancellor’s Office



### About California State University

California State University (“Cal State”) has 23 school campuses and eight off-campus centers, with an enrollment of approximately 437,000 students and about 44,000 faculty and other staff. CAL STATE is the largest four-year public university system in the United States and one of the top US producers of graduates who continue on to PhD studies. In addition, Cal State has a total of 17 AACSB-accredited graduate schools of business, over twice as many as any other collegiate system.

### About Cal State Libraries

The California State University system operates a consortium of 24 libraries, serving its 23 campuses and the California State University Maritime Academy. The libraries range from very large to small and are coordinated through a Central Office, part of the university’s Chancellor’s Office. The libraries collectively hold over 25 million titles.

In the Central Office, there is one department dedicated to supporting all the libraries in the consortium, including their technology solutions, and manages university e-resources. Another department in the Central Office handles negotiations with vendors of library resources, reaching agreements on fees, licensing issues, and the like. A third department is tasked with collecting funds from the Cal State constituent libraries to reimburse the Central Office for outlays associated with resource acquisitions.

The Electronic Core Collection (ECC) consists of electronic resources paid for by the Chancellor’s Office at no cost to the individual libraries. In addition, there are opt-in resources, which are also negotiated

for and purchased by the Chancellor’s Office; however, libraries that want to access the assets must subscribe and pay for this content.





## Before Alma: Manual, Uncoordinated, Siloed

The departments of the Central Office work together to help the libraries in the Cal State consortium obtain and maintain access to electronic resources that would otherwise be out of their reach, be it for reasons of budget, staff or time. In particular, this was intended to help the Cal State system's smaller and midsize libraries with few staff members.

The challenge was that the management systems in use, including in the Central Office, were heavily manual and very resource intensive. The negotiations department of the Central Office was using an Excel spreadsheet to track licenses, fees, and conditions. The library reimbursement schedules were also kept track of manually in Excel. As a result, each library had to track license information, costs, renewal periods, updates, and more on its own.

Moreover, the various Cal State libraries were using several different integrated library systems (ILS), with no centralized catalog of resources they all could access. Instead, each library was paying for its own cataloging system, which was separate and, many times, even incompatible with other systems used in the consortium and by the Central Office. And about half of the libraries did not have electronic resource management systems before the migration to Alma.

There were three link resolver applications in use, with SFX purchased centrally and running an instance, labeled "Chancellor", at the Central Office. Using SFX and Summon, the Central Office maintained the centrally paid-for and negotiated resources.

That heavily siloed ecosystem, pre-Alma, created a situation in which, many times, librarians were not even aware of the full range of data and resources available to them from the Central Office.

### Bringing It All into Alma

The inefficiencies in managing library resources at Cal State came with a significant cost – in time, money and effort – in such a large consortium. So, the Central Office decided to take action.

With Alma, the Central Office team determined, it would be possible to consolidate the various departmental and library services – negotiation, purchase, and management of electronic resources for the entire consortium. This involved migrating from disparate systems to Ex Libris solutions Alma and Primo, giving Cal State a resource management tool, a discovery layer, a shared library catalog, and an acquisitions layer all in one place. The ECC and opt-in content was also migrated, from SFX, to the Alma Network and the Institution Zones.

The distinctions between the various types of resources were preserved in Alma, as were the different needs of the various libraries, departments, and stakeholders. Alma also provided centralization for the tracking of payments, licensing and information on other negotiated terms.

Thus, with Alma, all Cal State libraries were better able to manage their resources – electronic and physical – and the Central Office had the powerful tools necessary to assist them.



# The Transition: Preparation was the Key to Success

Cal State went live with Alma in June 2017, after almost two years of preparatory work. That much time was necessary, due to the sheer size of the university's library network. Data and content from both the local libraries and the Central Office had to be prepared for migration from the diverse and dispersed older systems. In order to help make the process as successful and efficient as possible, Cal State created working groups and task forces dedicated to this project.

Migration was accomplished in stages. At first, just three libraries undertook the process. This gave the Cal State teams insight into how best to manage migration and, ultimately, deployment of the Ex Libris solutions across the consortium. A testing phase revealed further tweaks to be made and helped shape the documentation and procedures, including protocols for pre- and post-migration, as well as policies that would support effective use of the Alma and Primo solutions after go-live. Most especially, the transition teams had to develop workflows for managing the brand new relationship between the Central Office and the university's many libraries.

The period of migration and testing was very useful for Cal State, as was a once-a-week Q&A session with Ex Libris during the transition period, during which all potential and actual issues were addressed. In addition, Ex Libris provided training sessions for the Central Office team, which then, in turn, used what they learned to train others in the library network.

Ultimately, thanks to the time invested in preparation, implementing Alma and Primo in practice across the Cal State library network went extremely smoothly. As the Central Office team describes the day they went live, ready for a flood of calls: "It was pretty quiet. There were almost no questions at all from the libraries."



# Communication, Consistency and Savings Across the Consortium

The transition to Alma and Primo, with centralized acquisitions and management, took a lot of work off the plates of the individual Cal State libraries. Negotiations and purchase, as well as the tracking of license information, costs, renewal periods, and more, is all done by the Central Office, with remote and automatic updates for each library. The consortium's "one-stop shop" also includes shared documentation, title list spreadsheets, general information on available resources, license options, and more – available to all the libraries, all the time.

While the change has been especially helpful for the smaller and understaffed libraries, it has saved time and effort for all members of the Cal State consortium. They have reduced data entry and eliminated human error from many of their resource management workflows, by moving the burden of acquisition, licensing and management to the Central Office.

The new Cal State ecosystem allows the libraries to easily crosscheck their local information on any electronic resource with the data maintained at the Central Office (which is often more complete). It also makes it easier for the libraries to automatically populate their locally maintained purchase order documentation, to track any necessary reimbursements to the Central Office, with data directly from the central database.

The transition to Alma has also had a major, and positive, effect on the Central Office. All its constituent departments can now easily collaborate and ensure vendor records, licenses, and more are entered consistently and accurately. The pooling of knowledge, clarity of roles, and improved internal communications in the Central Office, along with instant access to data and resources via Alma, projects outward and improves services across the Cal State network of libraries.

The Central Office negotiations department has reported improved communications with vendors, as well. The department's team has a better understanding of how resources are being used in practice, including what agreements are working, what issues need to be cleared up, and more.

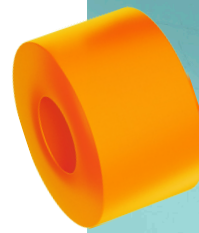
"For communication, it's been great," according to Jessica Hartwigsen, Library Systems Specialist at the California State University Chancellor's Office.

Central Office is now the first line of support for consortium librarians' queries regarding electronic resource management or Alma, with an open line to Ex Libris in the event that the Central Office team cannot resolve the issue. In addition, the Central Office maintains a testing group that gets first crack at Alma's monthly releases, with its fixes and features, in order to learn how they work and share the results with the consortium. This way, when libraries see new functionality in a new Alma release and want to know how it can benefit them, the testing team can provide the answer.

## 'What More Can We Centralize?'

Having seen success in implementing Alma and Primo, Cal State is seeking more centralization of data from vendor records, as well as within the licenses themselves. In addition, the Central Office team is exploring what Alma tools are available to them that they have yet to leverage across the consortium. In the meantime, as libraries use Alma more and more, they are learning to use the solution's tools in ways that best meet their needs – and then share that information with other libraries in the Cal State network.





## About Ex Libris

Ex Libris, a ProQuest company, is a leading global provider of cloud-based solutions for higher education. Offering SaaS solutions for the management and discovery of the full spectrum of library and scholarly materials, as well as mobile campus solutions driving student engagement and success, Ex Libris serves thousands of customers in 90 countries.

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