

# BACK TO THE FUTURE

AN EARLY IMPLEMENTER'S REASONS AND ROADMAP  
TO RE-IMPLEMENT ALMA

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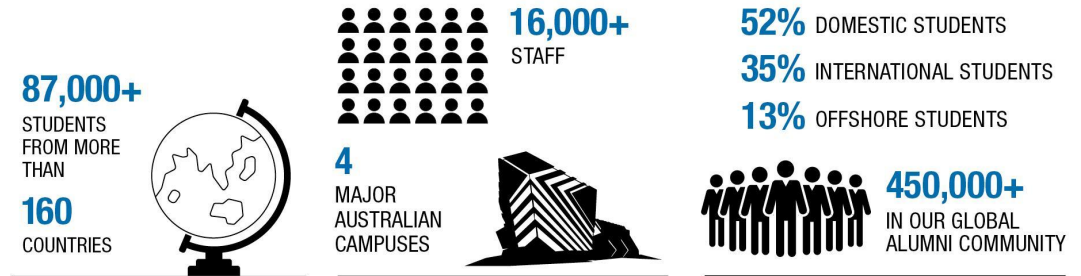


# MONASH UNIVERSITY

## MONASH UNIVERSITY AT A GLANCE

- Established 1958
- 347 students commenced in 1961
- Now Australia's Largest University
- Founding member of the Group of 8 universities
- <https://www.monash.edu/about/who/glance>

## OUR PEOPLE



## OUR COURSES

MONASH OFFERS ONE OF THE **LARGEST RANGES OF DEGREE AND DOUBLE DEGREE COURSES IN AUSTRALIA** IN THE AREAS OF:

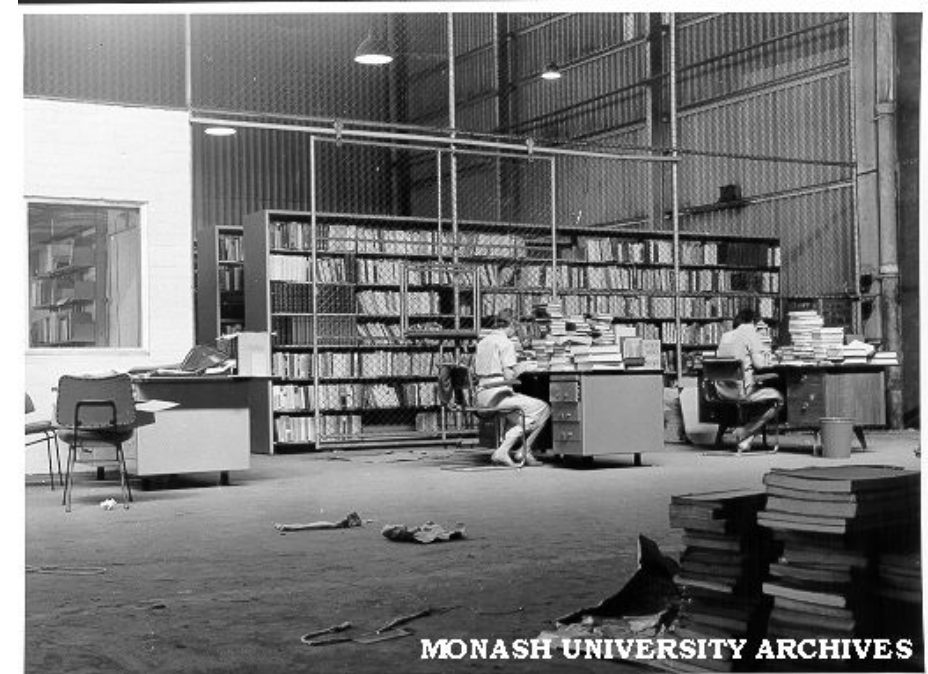
- ART, DESIGN AND ARCHITECTURE
- ARTS, HUMANITIES AND SOCIAL SCIENCES
- BUSINESS
- EDUCATION
- ENGINEERING
- INFORMATION TECHNOLOGY
- LAW
- MEDICINE, NURSING AND HEALTH SCIENCES
- PHARMACY AND PHARMACEUTICAL SCIENCES
- SCIENCE



# MONASH UNIVERSITY LIBRARY

## MONASH UNIVERSITY LIBRARY AT A GLANCE

- Annual collection budget: \$25 million (AUD), 4M resources
- 150 FTE Library staff
- 6 branches across 4 Australian campuses
- Indonesian campus in Jakarta
- Malaysia campus in Kuala Lumpur – separate organizational structure & Alma & Primo
- <https://www.monash.edu/library>



# MONASH + ALMA

## BRIEF HISTORY OF MONASH UNIVERSITY'S ALMA JOURNEY

- 2010 – ANZ Collaborative Development Partnership signed\* – Unified Resource Management
- 2010 – 2012 – Monash staff participated in 5 collaborative partner meetings
- 2013 – Monash Implementation (migration from Voyager)



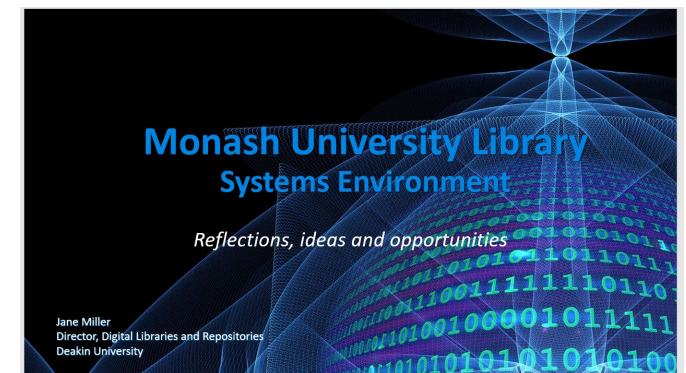
\* ANZ Collaborative Development Partners

# TAKING STOCK

## LIBRARY SYSTEMS REVIEW

Review of Monash University Library systems and digital services capability

- Scope - Systems, integrations with enterprise systems, governance, workflow processes, staff capability
- Conducted by Jane Miller – Director, Digital Libraries and Repositories (Deakin University)
- 3 days of conversations and interviews with approximately 33 staff, desktop analysis of systems environment, website and Library plan
- Outcome – The Miller Report (2019)





# THE MILLER REPORT (2019)

## FINDINGS AND RECOMMENDATIONS

- 12 Recommendations primarily associated with organisational frameworks and structure
- Challenges
  - Translation of strategy to operations
  - Shared understanding of governance requirements
  - Resources and Technology portfolio structure
  - Clarity around team identity and position titles
  - Culture of iterative review

The critical elements in any systems or technology based environment are

**People**

Communication

Business processes

Curiosity

# PROJECT TO 'RE-IMPLEMENT ALMA'

Approved August 2020

## BENEFITS

- Rethink and refresh **workflows** and data flows required to streamline operations, build **workforce capability** and knowledge in system functionality, and establish **governance** processes to manage the system.

## ANTICIPATED OUTCOMES

- Optimise full functionality of Alma
- Streamline and simplify workflows
- Improve knowledge of the capabilities of the Alma system
- Gain confidence in utilizing the system's current and emerging functionality
- Increase trust in data/information derived from Alma reports - e.g. financials
- Strengthen internal library administration and governance of the Alma system – e.g. management of authorized users, monthly upgrades, Alma roadmap
- Improve knowledge and management of the purpose, use, roles, and responsibilities of the Alma system

# AND THEN CAME COVID

## MORE GAPS EMERGE

### PROVIDING NEW VIRTUAL SERVICES AND SUPPORT FOR THE MONASH COMMUNITY

Our configuration, settings, role assignment, and organisational structure significantly limited our ability to respond

- Extension of loans – limited standardisation, complex to review and establish
- Click & Send service – complex to establish – unsustainable workflows
- Resource sharing – operated separately, with limited integrations to users
- Diversity of roles across branches – complex to provide a unified user experience

**5** **Reasons to leave home**  
In Melbourne and regional Victoria

- Shopping for necessary goods and services
- Caregiving or compassionate reasons, including medical care or to get a COVID-19 test
- Exercise (once a day for 2 hours)
- Authorised work (with a permit) or permitted education
- To get a COVID-19 vaccination

coronavirus.vic.gov.au  
1800 675 398 - 24 hours, 7 days

VICTORIA State Government | Department of Health

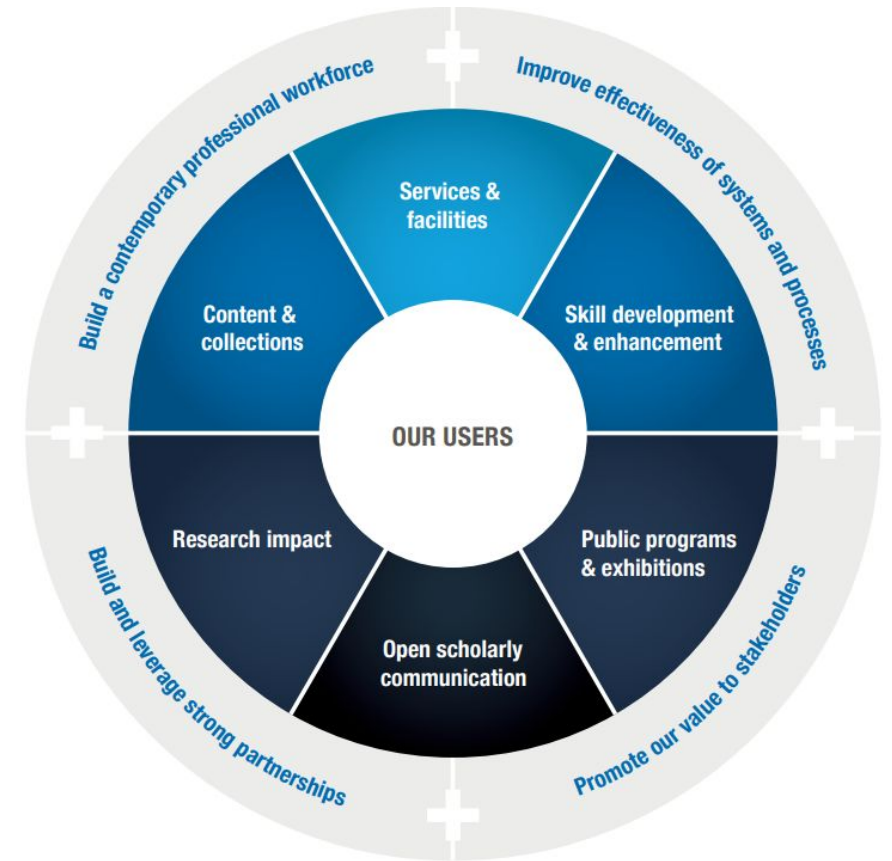


# AND THEN CAME AN ORGANISATIONAL RESTRUCTURE

APRIL – AUGUST 2021

## OUR ORGANISATIONAL CONTEXT CHNGES – IN A POSITIVE WAY

- Planned prior to COVID, but also shaped by COVID
- Smaller Library FTE
- Aligned to deliver the Library strategy
- Centralised services – Clarify, standardise and optimise service delivery to all Library users
- Simplified operating model that is consistent across all campuses
- Streamlined delivery of transactional services
- Clarify staff responsibilities and enable clear accountability at all staffing levels with the Library
- Recruitment of new staff – engaged the Alma community in staff selection



# RESUMING OUR ROAD TO ALMA RENEWAL

April 2022 -

## FORMAL EXPLORATION AND ROADMAP COMMENCES

- Develop roadmap, detailed project plan, conduct stakeholder engagement discussions
- Engaged a contractor with deep experience in libraries, service delivery, and with an ethos for social good and social inclusion

## Aims:

- Listen to stakeholders – inside and outside of the Library
- Prepare a detailed project plan
- Establish project governance and project design
- Start telling the story of ‘why’ we need to re-implement Alma



# STAKEHOLDER ENGAGEMENT

## LISTENING AND LEARNING FROM OUR COLLEAGUES

### FROM PAIN POINTS TO JOY POINTS

Issue/risk	Current status	Need to Achieve	Measurement (KPIs)
System governance	Dispersed and disconnected	System Governance mandated, delivered, and actively managed	Translation of Strategy into action ( e.g decisions made, projects completed etc.)
Workflows applied inconsistently	Non-standardised and incomplete	Standardised approach Documented 'As Is' & 'To Be' status Create 'Happy Paths'	Implement 'To Be' status Create 'Happy Paths' Regular review.
Malaysia Merge	Lack of clarity around merge impact	Clarity of organisational and system integration	Utilisation of Alma function consistent with Monash Australia
Continuous Improvement	Culture of CI not in place	Systemise and documented CI	Regular review and reporting
Reporting	Financial, status reporting, trend analysis inconsistent and ad hoc	Systematic approach to reporting processes	Regular reporting schedule

# STAKEHOLDER ENGAGEMENT

## LISTENING AND LEARNING FROM OUR COLLEAGUES

### FROM PAIN POINTS TO JOY POINTS

Issue/risk	Current status	Need to Achieve	Measurement (KPIs)
Library Service rules *	Ad Hoc, Legacy & low awareness	Structured and Systematic Review	User experience, consistency across sites
Alma Skills & Professional Development	Ad Hoc/Personal/Unstructured	Structured - PD paths linked to role/org and need - MyPlan	Annual 'Alma MyPlan' included in all staff reviews
Access & Role Clarity control	Unmoderated & lacking centralised management	Moderated access with ongoing review	Every System Administration role has clearly defined access ( min. annual review).
Search Results	Unfiltered results, order of results, quality of data returned.	Improved user experience Understand discovery and	User experience, consistency
Financial / system integrations	Double/triple manual handling	One-flow workflow	Reduced human intervention

# THE WISDOM OF THE CROWD

LISTENING AND LEARNING FROM OUR PEERS

## WHAT WE LEARNT FROM OUR PEERS

### Managing Alma

- Site visits in 2019
- Formalise roles and governance



### Stories of recent implementers

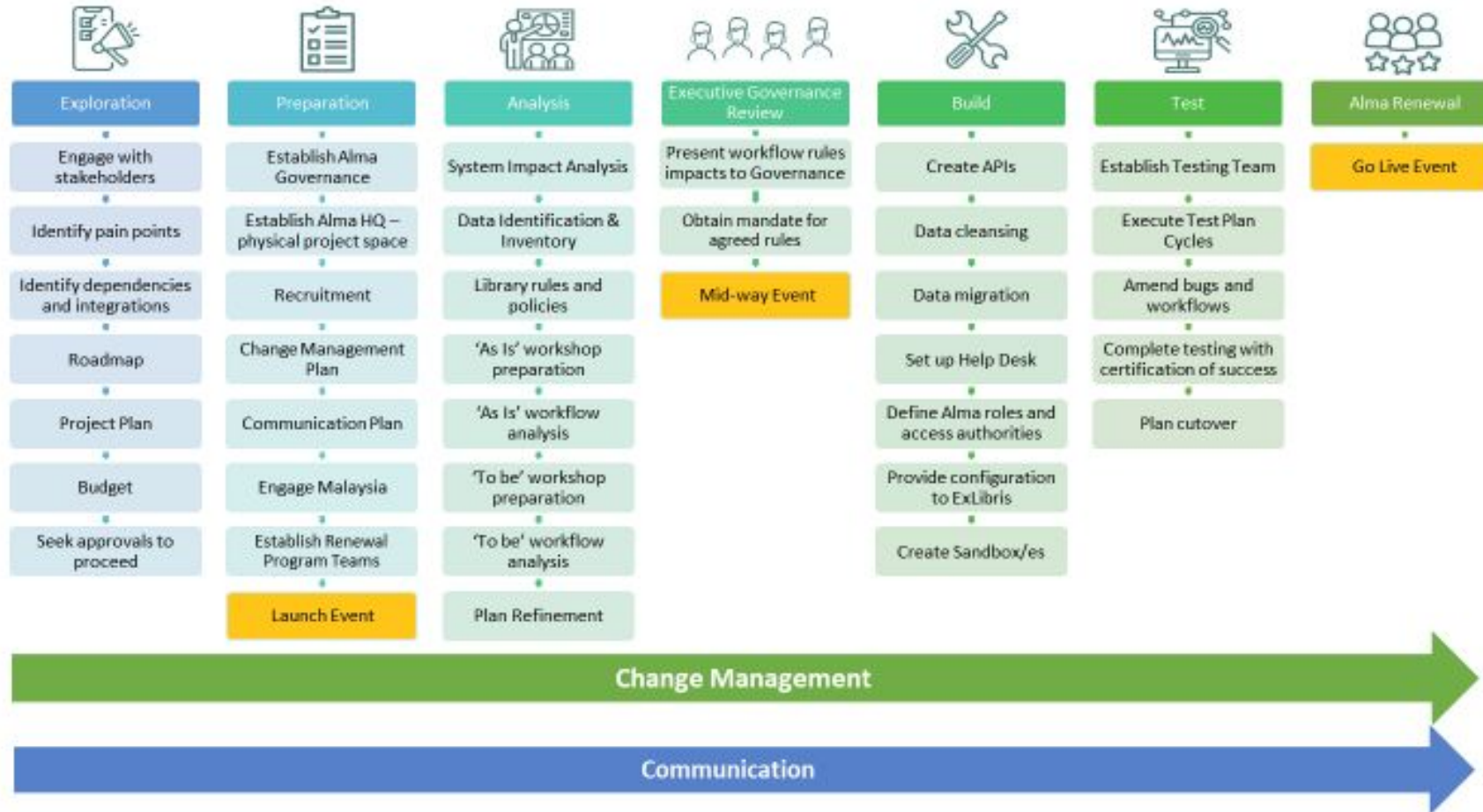
- Site visits in 2022
- Plan for sustainable change
- Engage everyone in the organisation in meaningful ways
- Renewal before optimisation and innovation





# THE FUTURE – RENEWAL not RE-IMPLEMENTATION

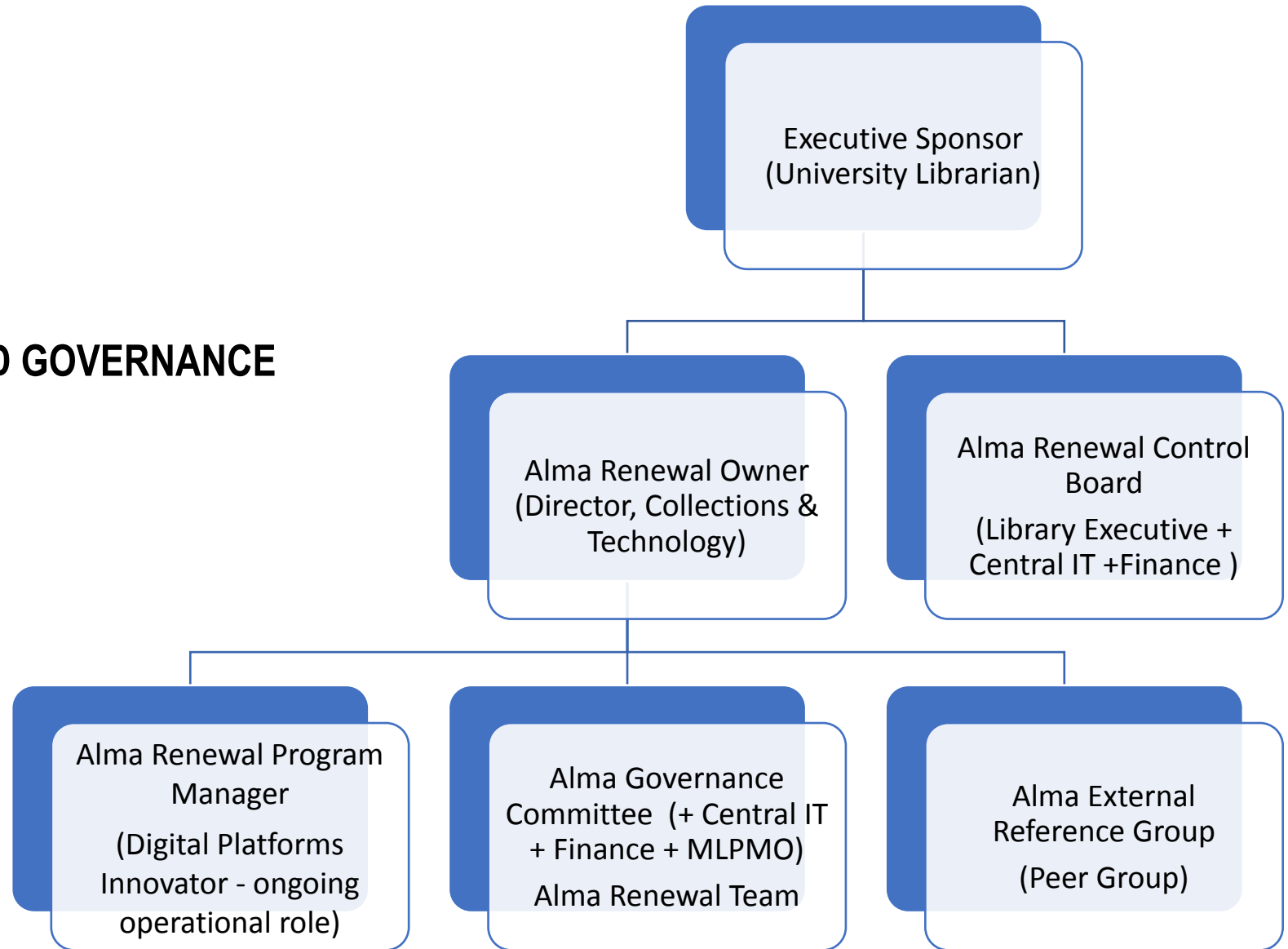
## Alma Renewal Program – Roadmap / Phases





# GOVERNANCE

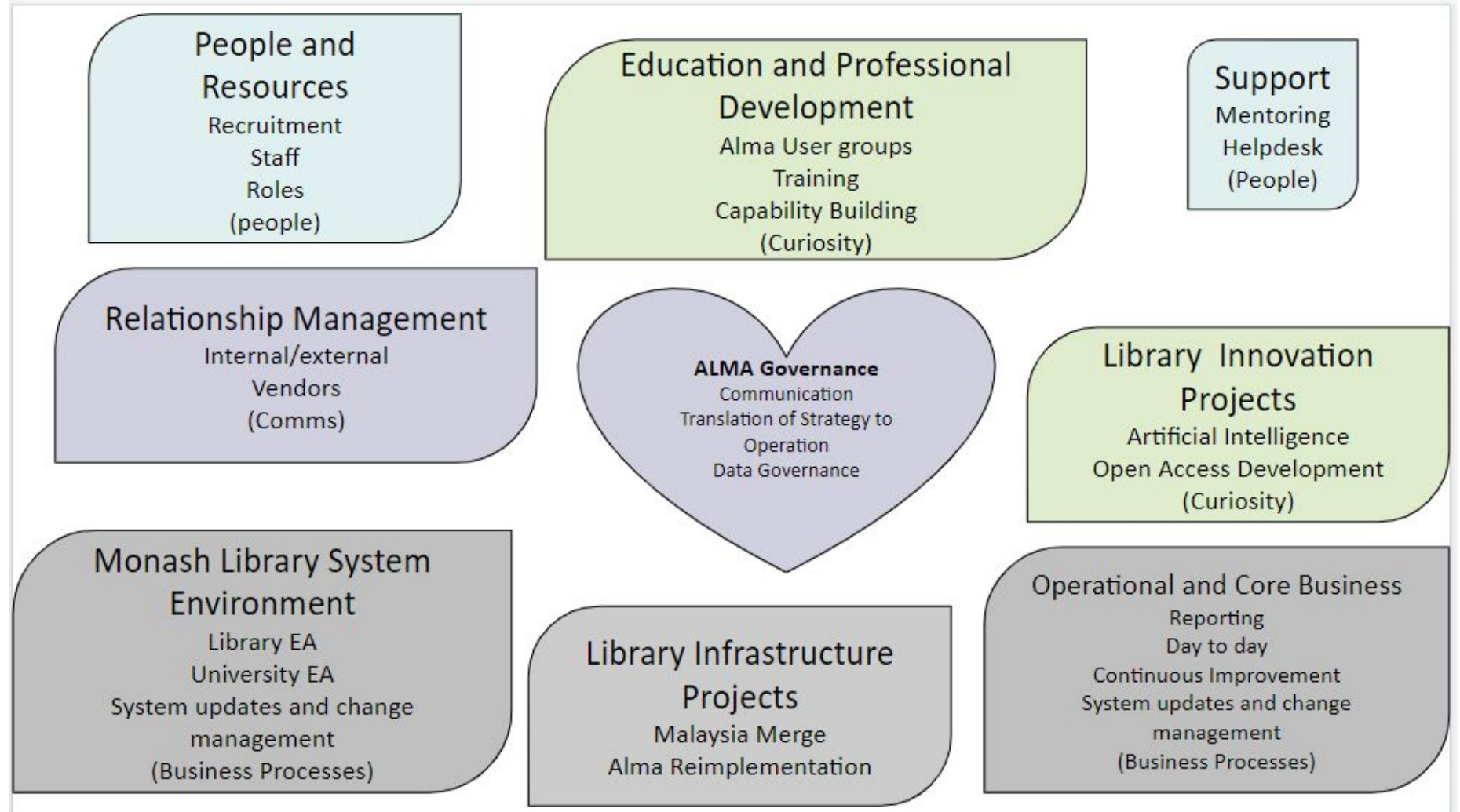
## PROGRAM GOVERNANCE – TRANSITION TO ONGOING GOOD GOVERNANCE



# BUILDING BLOCKS FOR OUR FUTURE

## ALIGNED WITH CRITICAL ELEMENTS:

- People
- Communication
- Business processes
- Curiosity



# THANK YOU



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