

Memorandum

To: Quebec University Library Staff

From: BCI Library Subcommittee

Object: Shared Service Platform – Project Progress Update (Note 9)

Date: April 23, 2019

Background

While most of the Integrated Library Management Systems (ILMS) in Quebec university libraries will have to be replaced by 2020, providers are gradually moving away from this technological approach to focus on Shared Service Platforms (SSP). In this context, Quebec university libraries have been collaborating on a project to replace their ILMS with an SSP under the supervision of the Library Subcommittee of the Bureau de coopération interuniversitaire (BCI) since fall 2014.

Project Progress Since the Last Memorandum on January 14, 2019

We are very pleased to be able to announce the solution chosen for the upcoming Quebec Library Shared Service Platform as a result of the call for tenders by competitive dialogue launched almost one year ago. The Selection Committee finally chose WorldShare Management Services (WMS) from OCLC, a non-profit library cooperative. OCLC tendered the lowest adjusted price following the qualitative evaluation of the responses to the call for tenders by the Selection Committee. The WMS platform is expected to be implemented in June 2020.

On Thursday, April 18, Mr. Claude Bédard, Director General, Bureau de coopération interuniversitaire (BCI), and authorized representative of the project, signed the contract with the supplier. At this point, the statement of work to implement the solution had been fully negotiated and the contractual clauses were finalized.

Having completed this very rigorous call for tenders with competitive dialogue, we firmly believe that this cloud-based solution (WMS) will fully meet our business needs as expressed in the call for tenders, and remain within budget. The WMS platform integrates all of the applications required for library management, covering licencing, acquisitions, circulation, metadata, resource sharing, as well as offering a discovery interface oriented to end-users. OCLC has also committed to developing new bilingual functionality, including mechanisms for the automated translation of search terms so as to maximise the retrieval of relevant resources.

We expect that our common budget will enable us to offer the whole list of shared services identified in the final business plan that was presented to MÉES (Ministère de l'Éducation et de l'Enseignement supérieur) in March 2017.

At a meeting on March 19, the Library Subcommittee adopted an organizational structure to manage project activities and supplier relations. In addition to the five existing working groups, four new entities were created for the implementation phase:

1. Local Coordinators Forum, for those designated by their respective institution's library director to coordinate local activities towards the implementation of the WMS platform. This forum's Executive Committee includes six members;
2. Data Conversion Working Group;
3. Partnership Forum, composed of the Chairs of the working groups and the local coordinators' Executive Committee. This is the primary group in charge of coordination and communication between the local coordinators and the working groups;
4. Implementation Monitoring Committee, which includes members of the SSP project team, two representatives from the Local Coordinators Forum and one of the working group Chairs. This entity coordinates with the supplier's implementation team.

Having said that, we have already begun working with the supplier to implement the WMS platform in June 2020. The first project deliverable requires the extraction of bibliographic and item data, for all of the partnership's 17 institutions, already in early May. We will be sharing the high-level project timeline as soon as our discussions with OCLC are completed. However, we can already announce that training for library staff on the WMS platform will take place primarily in April and May 2020. The Partnership Forum, in collaboration with the SSP project team, will be ensuring that all institutions contribute to each of the main implementation activities.

The Library Subcommittee would like to congratulate everyone who contributed to the success of this call for tenders for their remarkable efforts, especially the committee members, our Product Manager, François Charbonnier, who has been the main driver in the preparation of the tender documents, and our Project Manager, Roger Laframboise, who ensured that the call for tenders was conducted efficiently with GACEQ (Groupe d'approvisionnement en commun de l'Est du Québec), as this group was mandated to oversee the process.

Furthermore, Muriel Rorive joined the SSP project team as an Organizational Development Advisor (communication and change management) in early April. She has over 20 years experience in the academic field, namely as an administrator. Throughout her career, she completed several mandates to optimize administrative processes.

We would also like to note that Chantale Ste-Marie, business analyst, stepped down from the SSP project. In the coming weeks, we will be determining whether we maintain this position profile, considering the partnership's current needs as well as the consultation services that are available from the supplier to guide us in updating our business processes.

As we've reached an important milestone in this project, let us embrace the partnership's vision and work together to implement the platform in June 2020.

ON BEHALF OF THE QUEBEC UNIVERSITY LIBRARY DIRECTORS

Guylaine Beaudry
Chair, BCI Library Subcommittee

Benoit Séguin
Chair, SSP Steering Committee