#### Dos and don'ts for managing LMS change project within hybrid working environment

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CPD25 event: Changing library systems. 23rd March, 2022

## Objectives

- Contextual background
- How much engagement ?
- Project plan
- Some dos and don'ts
- Conclusion





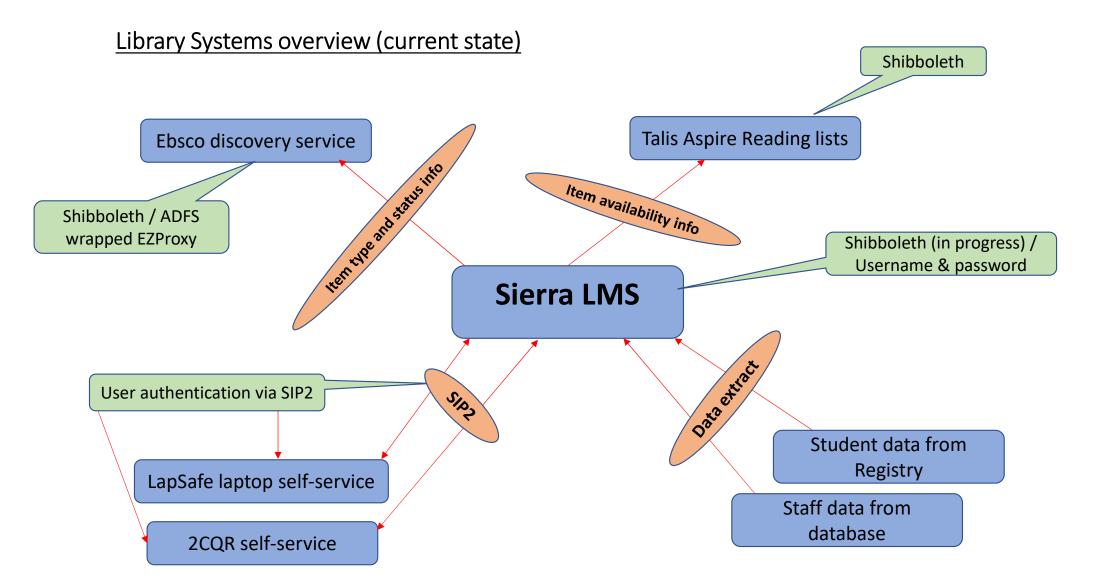
### London South Bank Group

- London South Bank University (3 sites)
- Lambeth College
- South Bank University Academy (for 11-19 Year olds)
- South Bank UTC (for 14-19 year olds)

#### Existing library technology portfolio

- Innovative Sierra ILS
- Talis Aspire Reading Lists
- Ebsco discovery services
- Bibliotheca & D-tech self-service
- External metadata provider
- Moodle as institutional VLE
- Shibboleth & Hosted EZProxy





#### ■ Library & Information Science Collection

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su(Library Automation) AND su(library management system) OR su(integrated library system) OR su(library software) OR su(library services platform)

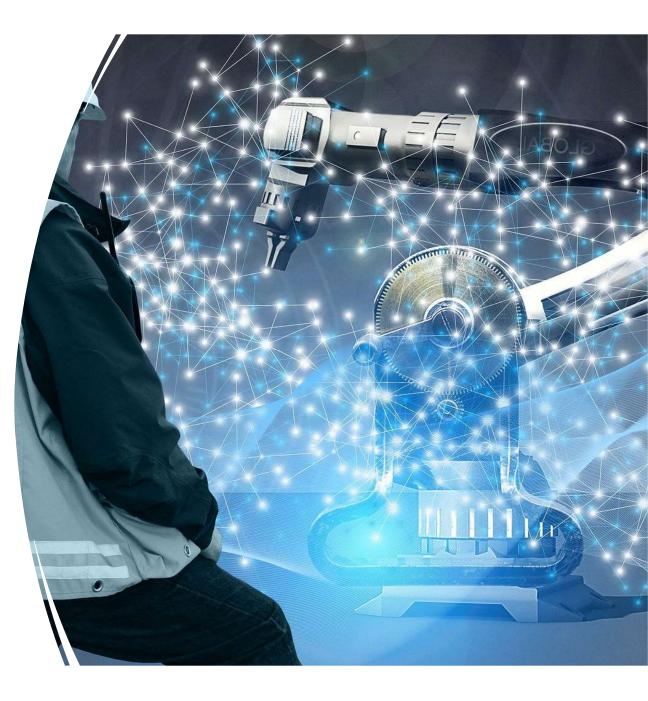
## Research highlights



# 402 results Applied filters Clear all filters 1990-201 ⊂ I

# APUC Framework suppliers

- OCLC WMS
- PTFS Europe
- ExLibris UK
- EBSCO International Inc





Why the LMS change ?

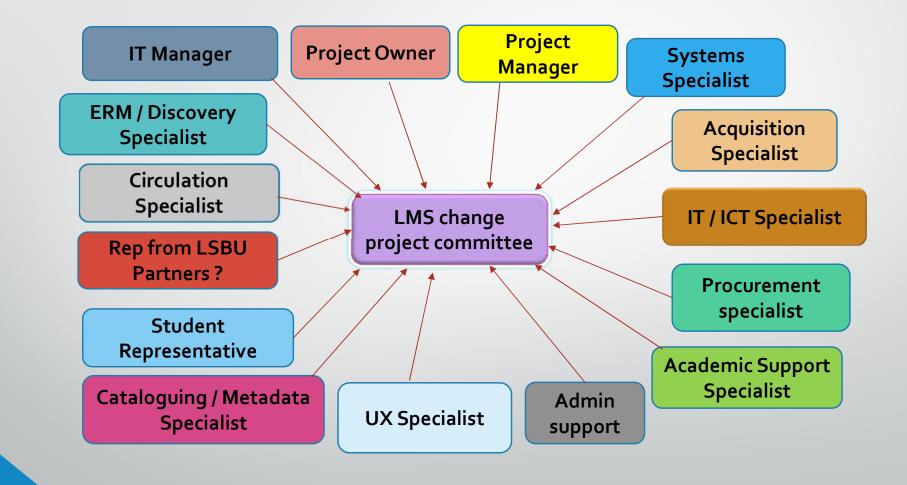
- Consistent infrastructure across the group
- Streamlined workflows
- Less integrations
- Future-facing and leading-edge technology

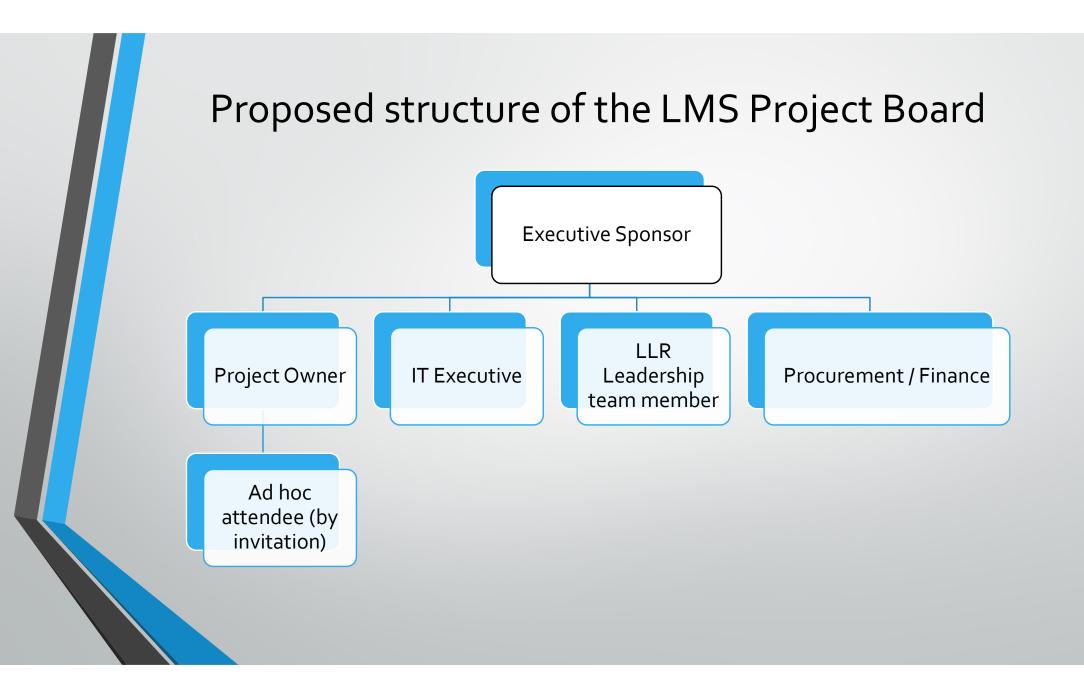
#### How much engagement ?

- Tokenism vs classic approach
- LMS change committee
- Role profiles
- Stakeholders mapping
- Onsite demos
- Visits of reference sites



#### Proposed structure of the LMS Project Committee





#### Review of the Project Plan

Mon 17/0		Start /06/19 Mon Thu 01/08/19 - Thu Engagement Mon 15/07/19 - Wed 15/07/20					Tendering Fri 17/07/20 - Mon 07/12/20 Impleme Mon 16/1				entation 11/20 - Wed 09/06/21				Post Thu		Finish Fri 30/07/21	
	0	Task Name	Duration 👻	Start 👻	Finish .	Prede	Q4	2019 Q1	Q2 Q3	Q4	2020 Q1	Q2 Q	3 Q4	2021 Q1 Q2	2 Q3	Q4	2022 Q1	Q2
1		▲ LSP Change Project	634.29 days	Mon 17/06/19	Fri 30/07/21					Ű						<u> </u>		
2		A Planning	38 days	Mon 17/06/19	Thu 01/08/19					1								
3		Develop draft project plan	5 days	Mon 17/06/19	Fri 21/06/19					1								
4		Project plan approval from the Senior managers team	15 days	Fri 21/06/19	Wed 10/07/19	3				ħ						ANNANA ANNA ANNA ANNA ANNA ANNA ANNA A		
5		Formulate LSP change project board	3 days	Wed 10/07/19	Mon 15/07/19	4				h								
6		Schdeule the project board meetings	5 days	Mon 15/07/19	Fri 19/07/19	5				Ť								
7		Agree actions plans and mini projects	10 days	Fri 19/07/19	Thu 01/08/19	6				Ť								
8		Scope planning	0 days	Thu 01/08/19	Thu 01/08/19	7				-	01/08							
9		Requirements gathering	69.29 days	Thu 01/08/19	Thu 24/10/19	7				ř	-1							
LO		Requirement gathering by orginising different meetings	60 days	Thu 01/08/19	Mon 14/10/19						-10							
11		Focus groups with library staff	10 days	Mon 05/08/19	Thu 15/08/19	1055				4								
12		Collation of LSP requirements	10 days	Mon 14/10/19	Thu 24/10/19	11SS												
13		Scope LSBU requirements	0 days	Thu 24/10/19	Thu 24/10/19	12					a 24	1/10						
14		<ul> <li>Engagement</li> </ul>	300.43 days	Mon 15/07/19	Wed 15/07/20													
15		Engagement with Procurement to develop tendering documentation	300 days	Mon 15/07/19	Wed 15/07/20					-						NAMA N		
16		Engagement with student union	300 days	Mon 15/07/19	Wed 15/07/20	15SS												
17		Engagement with Technical team	300 days	Mon 15/07/19	Wed 15/07/20	16SS				•								
18		Engagement with Registry	300 days	Mon 15/07/19	Wed 15/07/20	17SS				*								
19		Engagement with other HE libraries who have recently migrated to new LSP / LMS		Mon 15/07/19	Wed 15/07/20	18SS				•						WWWWW		
20		Engement with suppliers to arrange Product Demos prior to tendering	300 days	Mon 15/07/19	Wed 15/07/20	<b>19</b> SS				•				10		WWWWWW		
21		UX project (s) on Resources discovery	90 days	Mon 15/07/19	Thu 31/10/19						- 2							
22		Scope engagement	0 days	Wed 15/07/20	Wed 15/07/20	20FF							-	15/07				
23		Tendering	115.57 days	Fri 17/07/20	Mon 07/12/20	14FS+	2						×					



## Cyber attack

- Recovery plan
- More scrutiny
- Review of contracts
- Cloud first policy



### Impact of Covid19

- Online engagement
- Agenda setting
- More time for analysis

# Project approach

#### Procurement via APUC framework

LMS, Discovery, Reading list

800 plus functional statements

New library move

Change preparedness

Challenges and risks



# Requirement gathering

Collation of module based functional statements for LMS, keeping in view next 5 years

## Requirements

Electronic resource management

ILL

Circulation

System admin and integrations

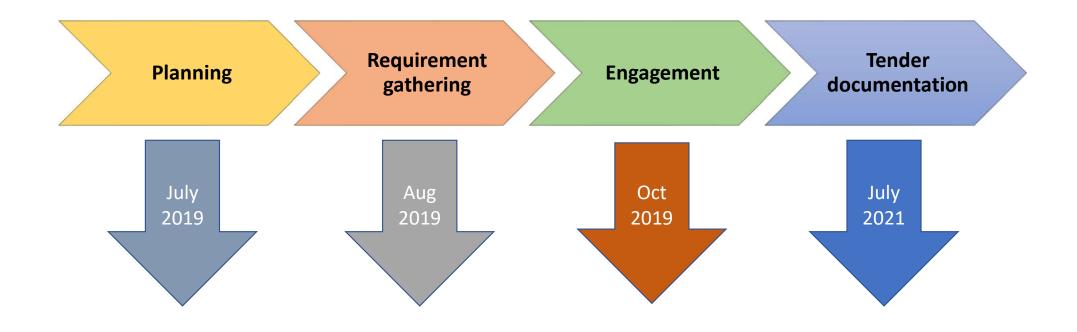
**Discovery and UX** 

Acquisitions

Metadata management

**General requirements** 

### Where we are in the project ?



#### Improvement journey

- LMS migration of Lambeth College into Sierra
- Discovery optimisation
- System status dashboard
- Staffing review
- SSO project
- Self-service refresh



## Outcomes so far

- Objective analysis
- Change ownership
- Horizon broadening
- SWOT analysis
- Terminological awareness
- Workflow standardisation



# Top tips

- Engage early
- Learn from everyone
- Suppliers as partners
- Knowledge management
- Basics of the game
- Review of UK HE libraries
- Why the project at all ?
- User involvement





### Top tips

- Business case making
- Understanding the bigger picture
- Flexibility
- Project sustainability
- Review of roadmaps
- Professional literature
- Tech trends
- Objective alignment

# Traps

- Who needs to know ?
- Let the experts voice their concerns.
- Informal data gathering
- Expectation management
- Emotional involvement





## References

- All the images used were collected from collection of copyright free gallery of PixaBay and were used for educational purpose.
- Search was conducted on Library & Information Science Collection (dated 18 March, 2022).