

Roles and Responsibilities of Migration Entities

Board

- Ensure I-Team has the resources needed to complete migration
 - including, but not limited to:
 - assigning individual and general priorities to library staff
 - providing resources (of all types - time, priorities, etc.) to I-Team members
 - keep staff apprised and in compliance with priorities and deadlines
- Create a supportive environment in the library and among CLIC colleagues for a successful migration including reinforcing positive and invested attitudes towards Alma and Primo.
- Make decisions **promptly** so CLIC can meet all implementation deadlines

Decision Making Role

- Final decision making body
 - May delegate some migration decision making to I-Team
- Responsible for all financial decisions

Communication

- Communicate with campus constituencies
- Communicate priority of migration to library staff

Board President, Emily Asch

- Board liaison to I-Team to facilitate communication and workflow
- Member of Project Lead Team

Decision Making Role

- Same as board

Communication

- Communicate directly between I-Team and Board

I-Team, CLIC Project Team as named in license, Functional Experts

- Implement Alma and Primo by performing necessary tasks and roles
- Per Ex Libris (Functional Experts):

- Provide expertise in acquisitions, resource management, fulfillment, public services, and data related to all library functions
- Coordinate testing and support requests
- Provide training to all CLIC staff
- Assign tasks as needed to existing CLIC committees or other functional / data experts
- Create and provide charge to task forces or working groups to address particular issues

Decision Making Role

- Decisions related to migration to new LMS
- Make recommendations to board regarding overarching and financial decisions for LMS

Communication

- Provide periodic project updates to all CLIC members.

I-Team Chairs, Greg Argo and Meg Manahan

- Ensure I-Team completes implementation and all the functions needed
- Facilitate, prioritize, and convene meetings, tasks, and deadlines
- Provide written agendas, convene meetings, provide and correct minutes
- Assign and enforce actions and decisions, etc.
- Members of CLIC Project Lead Team

Decision Making Role

- Ensure I-Team makes needed decisions
- Takes decisions needing board approval to board

Communication

- Update the CLIC Migration Website

I-Team as Committee Liaisons

- Take actions needed to CLIC committees and facilitates that process and communication with I-Team
- Assign tasks to the committees and working groups and ensure they're completed in a timely manner
- With Committee Chairs, ensure deadlines for individual tasks are met and appropriate for the overall project timeline
- Coordinate with other committee liaisons to ensure committee work does not overlap

Decision Making Role

- None

Communication

- Communicate with CLIC committees and other groups and among other I-Team members about activities of the committees

Executive Director, Ruth Dukelow

- Serve as official Project Lead as named in the Ex Libris contract
- Provide information and encouragement to all library staff at CLIC institutions
- As a member of the Project Lead Team, help to prioritize and facilitate communication and decisions

Decision Making Role

- None

Communication

- External communication (web announcements, news releases)

CLIC Project Lead, Ruth Dukelow

- As named in the Ex Libris contract, is the official contact person for CLIC to Ex Libris
- Member of CLIC Project Lead Team

Decision Making Role

None

Extractor, Sarah Johnston

- Extract and send data from Millennium to Alma

Decision Making Role

- None

Communication

- Communicate with Asch, Dukelow, and ExLibris as necessary

CLIC Committees & Other Groups

- Assist I-Team by responding quickly to assignments made by their I-Team liaison
- Help identify functional and data experts from within and outside of the committee
- Move quickly and effectively
 - Try not to rehash previous decisions. Don't let perfection get in the way of deadlines and completion of tasks.
- Consider the overall project goals and deadlines to ensure work does not become too detailed
- Embrace the new focus of Alma and Primo (use the system as it is intended i.e. electronic resource focused)

Decision Making Role

- Committees make recommendations to I-Team
 - If committee cannot agree on recommendation, the I-Team makes the decision

Communication

- Ensure information is being shared with all members of the committee/group
- Communicate regularly with the I-Team liaison

CLIC Committee Chairs

- Partner with I-Team Liaison to provide information requested by the ITeam
- Determine best workflow for committee to complete assigned tasks

CLIC Project Lead Team (Board President, Executive Director, ITeam Chairs) Emily Asch, Ruth Dukelow, Greg Argo, and Meg Manahan

- Attend to all communication, questions, answers that the CLIC Project Lead must perform
- Per Ex Libris this team will:
 - manage the involvement of I-Team resources
 - manage planning and deadlines
 - monitor progress and track status
 - drive issue escalation
 - provide status reports to Ex Libris
- Determine best course of action when I-Team reaches impasse or is unsure of policy level/concern
 - decide whether they can break the impasse and decide or whether it needs to go to Board

Decision Making Role

- Make on-the-fly decisions needed to move implementation forward during communication with Ex Libris

Communication

- Ensure I-Team understands any and all communication between Ex Libris and Project Lead
- Work as a close team to facilitate the work of the I-Team and ensure communication with Ex Libris is understood by all members of the I-Team