UC Collaborative Digital Projects
Roles and Responsibility Expectations
Systemwide Operations and Planning Advisory Group

Introduction

After much discussion and review of the "lessons learned" after the systemwide project to install the ILL VDX system, the Systemwide Operations and Planning Advisory Group (SOPAG) recommends the following outline of roles and responsibilities when any systemwide library project is undertaken. These factors and activities are meant to guide campuses in ensuring proper resources are devoted to the project, and that coordination and communication are effectively utilized.

We encourage consideration of the following factors in all phases of the collaborative project:

* *Communication* of project activities, timelines, decisions etc. both upward, eg. to SOPAG, downward, eg. to line staff, and across, eg. to ACG's or other departments.
* *Training*, both at the outset of the installation and ongoing, as new staff join campus units and trained staff leave
* *Documentation*
* Access to information needed for successful implementation
* *Milestones* at which the success of the project can be assessed
* *Evaluation* of the extent to which the project is meeting its goals
* *Continuous improvement*
* *Advocacy* for project goals and advice to central leadership on implementation and policy issues.

UC Libraries collaborative projects can be defined in three stages:

A) Needs Identification and Functional Specification Development

A business need is identified and documented, functional specifications are developed and often an RFP is created to find the best solution to address the need.

B) Implementation

Strong governance, project organization, clear roles and responsibilities for project members, and (especially) pre-implementation planning are key factors in the success of a collaborative project as well as a realistic assessment of available resources and understanding of existing workflows are also crucial for success.

C) Ongoing Service Management

Many collaborative projects end up creating a service that must be managed over time to ensure that the service remains successful and is being improved, as appropriate. A clear "handoff point" milestone from implementation to ongoing service must be put in place.

While all three stages of a project are important, the collaborative principles document provides guidance and factors to consider on the implementation phase of the project.

This structure includes:

SOPAG/CDL Joint Governance

The CDL and campuses share responsibility for collaborative projects they undertake through a shared governing body, which can be SOPAG, or appointed by SOPAG

The governing body owns the scope and requirement documents, sets policy, provides decision-making authority, makes resource decisions, and ensures accountability

Through the governing body, the CDL and each campus commit resources to ensure the overall success of the collaborative project.

Systemwide Planning and Implementation Group - Project Organization

The governing body will appoint a Systemwide Planning and Implementation Group (SPIG). The SPIG creates a Systemwide Project Management Plan and coordinates systemwide implementation, communications, assessment, training, etc.

The Systemwide Project Management Team, in collaboration with the local planning groups, should decide the order of task implementations, included in a project plan. The project plan should consider the following factors:

- Implementation plan
- Communications plan
- Training plan
- Assessment plan

The Campuses

Each campus should appoint a local planning and implementation group that would create a Local Project Management Plan for their campus, coordinating their campus implementation, communications, assessment, training, etc. Sufficient resources must be allocated at both the campus and systemwide level. Each campus in particular needs to identify staff who can be released for a period of testing and implementation.

All Campus Group Involvement

As appropriate All Campus Group Chairs, through the Systemwide Planning and Implementation Group should be involved in cross fertilization of ideas and impacts generated by the project plan. Communiqués should be posted in a timely way so ACG chairs can review project progress and ensure that ACG members are kept informed. ACGs could be directly involved in projects and/or may be consulted directly for feedback on major policy decisions, priorities, an impacts. ACG members are natural advocates to the implementation process on their campuses and clarify goals and objectives and identify local project resources for local campus library administration.