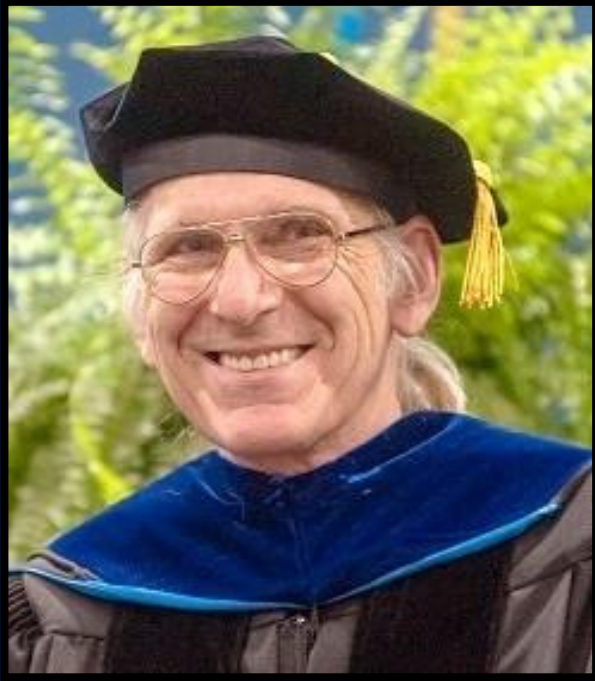**OLIS Update**
December 11, 2024

Agenda

- Innovative Instruction Ecosystem
- General Updates
- Functional Updates

Remembering our colleague, Joe.

Joseph A. Petrick, 1954-2024

The SUNY Office of Library and Information Services wishes to thank Joe for his years of dedicated service and commitment to SUNY students and our SUNY Library Community. He will be missed.

We extend our condolences to the Petrick family and Alfred State College for their loss.

Innovative Instruction Ecosystem

Forces Driving Change

External Forces

Internal Forces

Pedagogical Trends and Challenges

Technological Innovations

SUNY's Innovative Instruction Ecosystem 2.0

SUNY Investment

SUNY Innovation Activities

IITG Projects & Seed Grants

Scaling Innovation Projects

FACT2 Task Groups/Task Forces

Mechanisms for Sustaining Innovations at Scale
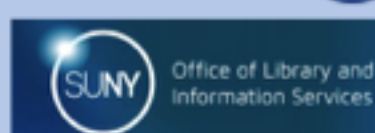
U-wide Strategy

U-wide Policy/ Standards

U-wide Infrastructure

U-wide Communities of Practice

ROI Analysis

Foundation for Innovation: Grants, Technology Platforms, Change Leadership, Dissemination, Community Engagement, Professional Development, Procurement/Contracts, Governance

SUNY Center for Professional Development

SUNY OER services

SUNY FACT²

SUNY OIT

SICAS

SUNY Online

SUNY Office of Library and Information Services

SUNY SOC

SUNY ITEC Information Technology Exchange Center

DIAS Engagement with SUNY Communities of Practice

SUNY Online

CoPs
- Directors of Online Learning
- Instructional Designers
- LMS Admins
- Faculty
- T&L Centers
- Student Support staff
- Academic Program Leads
- CIOs/CAOs
- EIT Accessibility Officers
- Change Leaders

Office of Library and Information Services

CoPs
- Library Directors & Staff
- Procurement Officers
- Faculty
- Academic Program Leads
- CIOs/CAOs

SUNY OER Services

CoPs
- OER Champions/ Leads
- Faculty
- Instructional Designers
- T&L Centers
- Library Directors & Staff
- Academic Program Leads
- CIOs/CAOs

Academic Innovation

CoPs
- Faculty
- Instructional Designers
- Directors of Online Learning
- T&L Centers
- Academic Program Leads
- CIOs/CAOs
- EIT Accessibility Officers
- Chief Diversity Officers
- Change Leaders

Digital Learning Environment

CoPs
- Instructional Designers
- Directors of Online Learning
- T&L Centers
- Procurement Officers
- Educational Technologists
- CIOs/CAOs/CISOs
- EIT Accessibility Officers
- change Leaders

Digital Academic Support Solutions

CoPs
- Student Support Staff
- Online Success Coaches and Concierges
- Directors of Online Learning
- CIOs/CAOs/CSAOs
- Associate/Vice Provosts

Faculty Advisory Council on Teaching and Technology

CoPs
- Student Support Staff
- Online Success Coaches and Concierges
- Directors of Online Learning
- CIOs/CAOs/CSAOs
- Associate-Vice Provosts

SUNY THE STATE UNIVERSITY OF NEW YORK

5-year aspiration for SUNY's IIE

Within five years, SUNY applies all elements of our ecosystem to collaboratively generate instructional innovations[1] that foster equitable impact across student populations[2] and sectors.[3]

A data-informed approach steers IIE for maximum impact and intentional scaling across future priorities, ensuring internal and stakeholder innovation-generation successfully addresses pivotal trends, challenges, and opportunities.

[1] Here, *instructional innovation* encompasses changes within teaching practices and learning environments (i.e. classrooms, labs, libraries, digital spaces, etc.), a subset of academic innovation, which encompasses a broader academic environment and a scope of stakeholders that DIAS does not influence directly
[2] Student populations refer to underrepresented, adult, and online learners) and sectors (e.g., U-Centers, Comprehensives, Tech Sector, and Community Colleges
[3] Sectors encompasses U-Centers, Comprehensives, Tech Sector, and Community Colleges

A matured IIE that delivers on these measures would support all four of the Chancellor's pillars for SUNY success

While DIAS's 5-year aspiration for IIE is framed in terms of student success, a matured IIE will advance all four pillars

⭐ STUDENT SUCCESS
enabled by more personalized and collaborative learning at greater scale

- 😊 Improving engagement and satisfaction
- 🎯 Increasing retention and completion rates
- ⏰ Reducing time to degree
- 💼 Enhancing workforce readiness
- 🧩 Individualized support structures
- 🔍 Delivering novel learning experiences
- 🗨️🗨️ Promoting peer-to-peer collaboration

🔬 RESEARCH AND SCHOLARSHIP
supported by more data and partnerships to facilitate iterative R&D for teaching and learning

- 💡 Incentivizing research to improve teaching and learning
- 📋 Codifying best practices for scalable design
- ⏳ Reducing faculty time spent on transactional / administrative work
- 📊 Improving data systems
- 🤝 Leveraging industry partnerships for capital and technologies
- 💰 Optimizing unit economics of instructional delivery

🌍 DIVERSITY, EQUITY AND INCLUSION
advanced by amplifying support structures for underrepresented students

- 🎨 Enhancing personalized feedback
- 🏭 Improving support structures
- 🌐 Growing online and hybrid modalities for flexible learning with greater reach and scale
- 🌍 Adapting curriculums across languages and prior knowledge
- 🔄 Enabling re-engagement and completion of "stop outs" through technology

📈 ECONOMIC DEVELOPMENT AND UPWARD MOBILITY
enhanced by 21st-century skill development and industry collaboration

- 🎓 Producing more degrees
- 👨‍🏫 Awarding more teaching certificates
- 🏢 Attracting new businesses and keeping old ones
- 🔬 Targeted R&D leading to more publications, patents, inventions, and commercialization
- 🚀 Targeted R&D leading to more grants, philanthropy, and state funding

SUNY THE STATE UNIVERSITY OF NEW YORK

General Updates

Staffing

- Catherine Stollar Peters has new role as the Director of Research Data Strategy for ORIED

- Digital Initiatives Librarian job opening

- Staffing challenges for next semester – will be focusing on the following initiatives:
  - AI in Alma / Primo
  - Resource Sharing Task Force
  - OCLC negotiations / pricing
  - Elsevier Task Group

Five-year Alma / Primo VE Anniversary wrap up

- ELUNA consortium membership
- Success metrics for benchmarking
- Innovation and AI product developments webinar
- Assessment Health Checklists
- Alma Guidelines / Policies reviews
- Site visits

Ex Libris / OLIS site visits: October 28 – November 1

- In-person site visits
  - Maureen Clements (SLS)
  - Asaf Kline (Ex-Libris)
- Between 2-3 hours in length
  - Strategy discussion
  - Product Roadmap presentation
  - Staff meeting to talk about Alma / Primo VE functionality

- Binghamton
- Broome
- Albany
- Morrisville
- Oswego
- Buffalo State
- Univ of Buffalo
- System Admin

Ex Libris updates

- New CEO – Matti Shem Tov (formerly Proquest/Ex Libris)

- New AI-powered tools being developed
  - Research Assistant
  - AI Metadata Assistant
  - Specto (Alma D)
  - Analytics Assistant (future)

Ex Libris updates

- New and developing functionality:
  - Collecto (available in preview)
  - MixPanel Discovery Analytics (still in development)
  - New Discovery Experience (still in development)
  - Library Open Workflow (premium service/still in dev)
  - Open ILL Network (developing)

Takeaways / Outcomes

- To implement or not to implement?
  - Our approach is to encourage experimentation so that each school can decide if/when/how they want to use the tools

- Principles / Sustainability -
  - [Artificial Intelligence | Clarivate](#)
  - [Clarivate-Environmental-Management-Statement.pdf](#)
  - [AI Advisory Board for Ethics](#)

- Other questions / issues we want Ex Libris to address?

Outcomes / Takeaways

- Strategic priorities differ across schools
- Schools are generally happy with Alma functionality
- We do not have a [Collection Retention](#) policy
- Requests for improved
  - QR code functionality
  - Room booking functionality
  - Better faceting

- Next up: Spring semester session on Collecto, QA process review, Site Visit Wrap-up

Projects and Initiatives

Ongoing projects / Task Groups

- Resource Sharing Platforms Task Group

- SUNYConnect Core Renewal Task Group

- AI LibGuide Working Group: Ken Fujiuchi: fujiuck@buffalostate.edu

- FACT2 Experiential Learning: (**Co-chairs:** Mara Huber (mbhuber@buffalo.edu) Ed Beck (ed.beck@oneonta.edu)

- FACT2 Generative AI in Action: **Co-chairs** Jeffrey Riman (jeffrey_riman@fitnyc.edu) or Billie Franchini (bfranchini@albany.edu)

OCLC Negotiations Advisory Group

The SUNY OCLC Negotiations Advisory Group, in coordination with the SUNY Library Services (SLS), will review pricing and offers provided by OCLC for SUNY's expected FY27 licensing of OCLC's library information management, cataloging, and interlibrary loan services. This group will help make recommendations for adoption and possible future directions. Advisory board members will be expected to gather input from and represent their respective sectors.

- Karen Gelles (Farmingdale)
- Jess Hibbard (Genesee CC)
- Leslie Preston (FIT)
- Kabel Stanwicks (Univ of Albany)
- Jamie Saragossi (Stony Brook)
- Mark Sullivan (Geneseo)

Thank you for volunteering!

Authority Control Jobs

- SUNY chose not to run the Alma authority control jobs at implementation
- However, due to improvements in how the authority control jobs work and the need to run them to support other features in Alma/Primo that rely on linked data, we will start running the *Link BIB Headings job* in the NZ and in campus IZs
- This is a change from *MSP-56 (Using OCLC Authority Control in Alma)* and has been discussed with the SMSP
- We expect to turn this job on in late December and there should be no disruptions to regular Alma work

MARC 245 $a Title Boosting

There's been recent discussion on Primo-L about a boosting mechanism that Ex Libris can modify, where you can choose a single MARC field and subfield for boosting. We're considering asking them to boost the 245 $a.

This boosting would need to be a universal change, done both in the NZ and in all institution IZs. Other institutions and consortia have found this change to be beneficial. Does anyone have any objections to our requesting this special boosting?

If there are no objections, we'd plan to ask Ex Libris to make this change around the same time that we activate the new authorities job, so that we can take advantage of any reindexing that needs to be done to get the changes to take effect.

Functional Update Highlights

Cataloging & Metadata

- **AI Metadata Assistant:** Now available in Alma and can be used to create IZ-only bibliographic records. Learn more: [How can I use the AI Metadata Assistant](#) FAQ.
- **Government Document Bibliographic Records**: With the demise of MARCIVE, we are interested in knowing how campuses are managing their government document bibliographic records and if there may be interest in centralized management options via the NZ. Please contact info@sunyolis.libanswers.com if you are interested or would like to discuss further.

Discovery

- **Primo VE AI Research Assistant:** The new AI Research Assistant continues to evolve. See our FAQ for [information about how to set it up](), and for links to Ex Libris documentation.
- **New Discovery Experience (NDE):** The [new discovery platform]() will go live for testing in May 2025. Consortial features like "Get It from another library" won't be configured until later in 2025. There is no rush to migrate, and you'll be able to run Primo VE and the NDE side by side if you want to test it. SLS will migrate all supported libraries at the same time, tentatively during the summer of 2026.
- **Mixpanel:** the [new Primo analytics module]() is currently being beta tested by a group of libraries, including University at Buffalo and Binghamton. Focus is on the "user journey."

E-Resources & Collections

- **EBSCOhost:** Your campus will be automatically migrated to the new platform on January 7, 2025, unless you have explicitly asked EBSCO not to migrate you.

- **Direct Charges** for FY25 will be billed soon. If you have any questions, please reach out to info@sunyolis.libanswers.com.

- **Collections Summit**: Recording / slides are available Collections Summit Part 1, September 26, 2024 and Part 2, October 3, 2024

E-Resources / Collections

- **SUNYConnect Core task group:** The SUNYConnect Task Force has been meeting and evaluating the EBSCO and Gale SUNYConnect products, which are up for renewal at the end of this fiscal year. They have been reviewing data and drafting a rubric to use in the evaluation. They expect to make a recommendation to OLIS by the end of this calendar year.

- **Elsevier renewal task group:** OLIS will be convening a task force in Spring 2025 to review the Elsevier ScienceDirect journal package. The current license expires on December 31, 2025. We will send an announcement in early spring semester and that describes the charge and calls for members.

Resource Sharing

•**New Interface for Manage Patron Services**: The November 2024 Alma update contained an updated version of the Manage Patron Services and Return Items interfaces. The old interfaces are still the default interfaces, so you'll need to opt in to use the new interfaces. Information on how to opt in to using the new interfaces and a demo of the new interfaces can be found [here](). Ex Libris currently plans to make the new interfaces the default interfaces in May 2025.

Resource Sharing Task Group

- Angela Persico (U of Albany)
- Dana Antonucci-Durgan (Suffolk)
- Domenick Gasparro (Westchester)
- Elise Thornley (Binghamton)
- Faith O'Brien (Oswego)
- Glen Bogardus (Potsdam)
- Grath Madden (Maritime)
- Jessica McGivney (Farmingdale)

- Kerri Wilkes (Fredonia)
- Liz Simmons (Genesee)
- Mark Sullivan (Geneseo)
- Matthew Hartman (Stony Brook)
- Parker O'Mara (Plattsburgh)
- Paul Whiting (U of Buffalo)
- Rebecca Voisich (Old Westbury)
- Sarah Trencansky (Broome)

Resource Sharing Task Group

- Resource Sharing Platform Evaluation Survey
  - Designed to help your library assess its resource sharing platform subscriptions for pricing, statistics, etc.
  - Trying to determine what data campuses need help gathering