



OLIS Update
June 6, 2025



Agenda

- General Updates
- DTP / RDM project - Catherine Stollar Peters
- SMSP Policies Project wrap up – Marcy Strong
- Accessibility
- Functional updates



Welcome David Breiner & Barbara Beauchamp

Welcome David Breiner our new Associate Director for Licensing - David will provide leadership for all licensing and contracts for digital platforms and digital subscriptions for the SUNY-wide Office of Library and Information Services (OLIS). David will work with OLIS leadership and staff to develop, implement, and manage the procurement, licensing, contracts, and direct charges for university-wide library services and platforms

Welcome Barbara Beauchamp, DIAS' new Assistant Provost for EIT Accessibility Barbara will be working collaboratively with a team across SUNY System Administration to develop a plan and implement the EIT Accessibility initiatives for the System Office to ensure compliance. She will also be supporting SUNY Campuses by leading the EIT Accessibility Community of Practice, serving as the SUNY System liaison for campus EIT Accessibility Officers, and working closely with the EIT Accessibility Advisory Committee



OLIS and SUNY Online Impact Reports





FACT² Generative AI Task Group

AI Tutor Subcommittee

Completed

- Survey to SUNY Campuses regarding current projects and interest in an AI Tutor (>500 responses so far)
- Outlining chapter for the SUNY FACT2 Guide for Optimizing AI in Higher Ed

In Progress

- Research on chapter topics - draft of chapter forthcoming
- Analyzing survey to expand and focus on specific areas of interest to SUNY faculty and for the new AI Guide chapter

Continued collaboration with SUNY DTP to learn about existing AI Tutor tools



FACT² Generative AI Task Group

Teaching and Learning with AI Subcommittee

Completed

- Create an instrument to evaluate AI tools for teaching and learning
- Provide guidelines for using the instrument
- Model the AI Tool evaluation process using the instrument

8 Tools evaluated using the instrument, with one-page summaries and supporting evidence provided.

In Progress

- Analyze evaluation results
- Create case-studies based on evaluation results, due April 11.
- Review the 2nd edition of the SUNY FACT2 Guide for Optimizing AI in Higher Education for areas in need of updating - in-progress



FACT² Generative AI Task Group

AI Policy Considerations Subcommittee

Completed

- Research existing Institutional AI Policies/ Guidelines
- Identify common themes/elements
- Develop content for 3rd edition of the SUNY FACT2 Guide for Optimizing AI in Higher Education

In Progress

- Complete draft of Policy Development chapter of the 3rd edition of the SUNY FACT2 Guide for Optimizing AI in Higher Education
- Compile all sources and create a bibliography
- Create a list of additional resources on each topic for further exploration



FACT² Experiential Learning Task Group

Spring Webinar Series

1. [\(March 27\) Experiential Learning in the Age of AI: Activating Student Potential & Leveraging Campus Strengths](#)
2. [\(April 3\) Internships That Work: Designing Scalable, Supportive Models for Students & Mentors](#)
3. [\(April 10\) Making Every Course Experiential: Strategies for Curricular Integration](#)
4. [\(April 17\) Experiential Learning for a Thriving Planet: Education, Action, and Impact](#)
5. [\(April 24\) From Experience to Evidence: Assessing the Impact of Experiential Learning](#)
6. [**\(May 1\) What's Next: How to Sustain Multi-Institution Collaboration**](#)

[Registration](#)

All webinars are archived at https://online.suny.edu/experiential_learning/



SUNY FACT² Experiential Learning Champions Playbook

- Campuses were invited to provide submissions for the FACT² Experiential Learning Champions Playbook. While we've received several excellent contributions, we hope to expand the collection to ensure it becomes a rich and lasting resource for campuses across the system.
- Campus Leaders have been sharing their best practices around Experiential Learning.
- [Contribute to the Playbook](#)

Browse by Theme

[Defining Experiential Learning \(What Counts?\)](#)

How do you define Experiential Learning? How will that definition impact your approach?

Defining Experiential Learning

[Making the Case for Experiential Learning](#)

Build a network of supporters to advocate for the change you want to make.

Making the Case

[Measuring Impact with Experiential Learning and Data](#)

Define what success looks like for your initiative and how you'll measure progress.

Measuring Impact

[Supporting Faculty Through Change](#)

Identify and deliver resources to support faculty members' success enhancing their courses and mentoring with experiential learning.

Supporting Faculty

[Integrating Experiential Learning Across the Curriculum](#)

Integrate Experiential Learning into courses and degree requirements.

Curricular Integration

[Sustaining Change and Impact](#)

Put measures in place to make your initiative viable and successful going forward.

Sustaining Change



2025-26 Academic Innovation Grants Innovative Instruction Technology Grants (IITG)

Open Educational Resources (OER) Impact Grants

Goal: Promote academic innovation aligned with Chancellor's Four Pillars

Focus on:

AI for teaching & learning (IITG)

Expanding OER adoption

Two- Stage Process:

Stage 1: Ideation Form submission and participation in
Town Hall webinars

Stage 2: Full proposal submission and review

Current Status:

Awards announced in May!





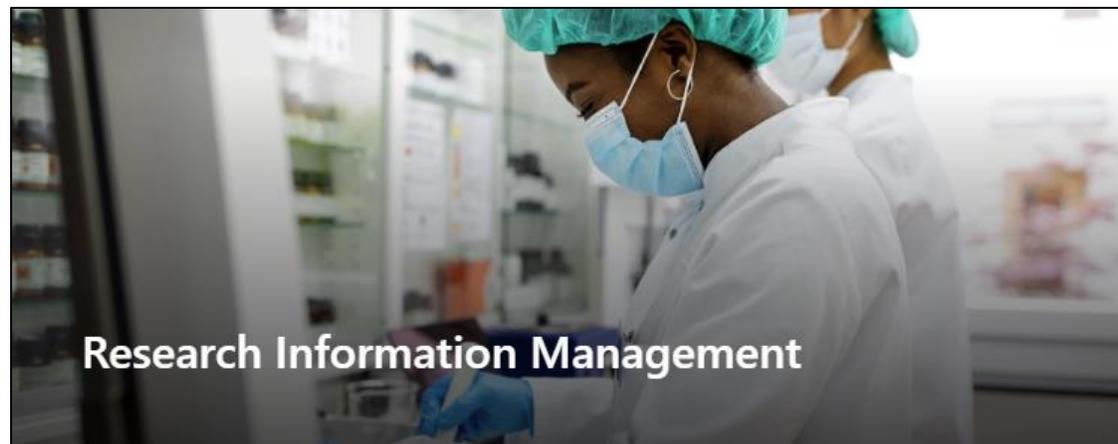
Academic Affairs Strategy

- Strategic Plan for Academic Affairs – kicking off this summer
 - Alignment within the SUNY Priorities
- Stakeholder Engagement to provide campus perspectives
 - Conferences
 - Advisory Boards
 - Communities of Practice
- Alignment of DIAS Org Strategic Plans with Academic Affairs Plan



SUNY Digital Transformation Project

<http://dtp.suny.edu>





Research Data Strategy

Welcome Catherine Stollar Peters – Director of Research Data Strategy at ORIED



Projects and Initiatives



SUNY Metadata Standards and Policies Working Group (SMSP): Project to update policies

What is the SMSP?

Charge:

- With cataloging community input and OLIS assistance, develop and maintain standard system-wide policies, best practices, workflows, configurations, and projects for metadata practices within the SUNY ALMA Library Services Platform (LSP).
- Work in consultation with other SUNY working groups.
- Review needs, options, and opportunities for cataloging and metadata training in SUNY, and recommend training and documentation plans to OLIS.

Who is the SMSP?

- Barbara Biljan, Genesee Community College
 - Catherine Carra, SUNY Oswego
 - Megan Coder, SUNY New Paltz
 - Joan Cook, Suffolk County Community College
 - Leslie Feldballe, University at Buffalo, Chair
 - Sasha Frizzell, Binghamton University
 - Maria Planansky, Alfred University
 - Susan Perry, SUNY Library Services
 - Marcy Strong, SUNY Library Services
 - Wendy West, University at Albany
 - Jill Yaples, Binghamton University
- And David Floyd, Binghamton University (former member)



Metadata Standards and Policies Working Group

[Committee Members & Charge](#)

[Meeting Minutes](#)

[Approved Policies](#)

[Approved policies](#)

[Best Practices](#)

[Superseded Policies](#)

[Superseded Best Practices](#)

[Superseded Charges](#)

Approved policies

-  [SUNY Minimum Cataloging Subscription Services Requirements](#)
-  [MSP-1 Bibliographic utility](#)
-  [MSP-2 Cataloging at the WorldCat Level](#)
-  [MSP-3 ALMA Network Zone](#)
-  [MSP-4 Floor bibliographic standards](#)
-  [MSP-5 Single vs Separate Records](#)
-  [MSP-6 Provider-Neutral Records](#)
-  [MSP-7 Level of PCC Contribution](#)
-  [MSP-9 Cataloging of titles on e-Readers](#)
-  [MSP-10 Contributing Collections to the CZ](#)
-  [MSP-11 CZ Activation for Aggregator Collections](#)
-  [MSP-12 Language of Cataloging](#)
-  [MSP-13 Parallel cataloging procedures](#)
-  [MSP-14 In-Process Brief Bibliographic Records](#)
-  [MSP-16 Syncing brief levels](#)
-  [MSP-17 Numeric Character References](#)
-  [MSP-18 Minimum Acquisitions Data](#)
-  [MSP-23 Adding missing ISBNs to existing WorldCat master records](#)
-  [MSP-25 Overlaying Brief Records in the Network Zone](#)
-  [MSP-27 Deleting bare NZ records from an IZ](#)
-  [MSP-28 Working in Alma and the Network Zone](#)



MSP-1
SUNY Libraries Consortium Metadata Policies
Policy: Bibliographic utility

Policy justification:

A bibliographic utility is the name for a computer service organization that maintains large databases of cataloging records and offers various cataloging support services and related products to libraries and other customers who access those records on an online, timesharing basis. OCLC is a bibliographic utility.

OCLC will be the primary bibliographic utility used by the SUNY system.

The presence of unique OCLC record numbers in bibliographic records makes it possible to match records in Alma when materials are owned by multiple SUNY libraries. The unique OCLC record number provides a match point that simplifies record loading, record maintenance, and other technical operations. Requiring use of a common bibliographic utility ensures that the records of SUNY libraries can be merged and maintained with greater ease in Alma.

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- Members must use OCLC as their primary bibliographic utility
 - Members must use the OCLC record number as the primary match point when exporting records into Alma, except in cases where an SUNY policy has been established to use a different match point
 - The following types of bibliographic records are not required to contain OCLC record numbers or to have holdings set in OCLC:
 - records created for ordering purposes
 - personal-copy course reserves
 - titles borrowed on ILL from outside the SUNY system
 - inventory control of equipment
 - records representing titles in a knowledgebase
 - MARCIVE shipping list records
 - host bibliographic records for bound-withs
 - suppressed bibliographic records
 - record sets provided by vendors other than OCLC, including leased book sets

Any further exceptions must be approved by the Metadata Standards and Policies Working Group.

Process

- Review and rewriting of policies went from April 2024-February 2025
- Discussed 3-4 policies per month
- Used Basecamp to manage drafts and conversations
- Tracked decisions and progress on a shared spreadsheet

1	Policy #	Policy name	Schedule for review	Review notes	Keep?	Type	Proposed numbering
4	MSP-02	Cataloging at the WorldCat Level	2024-04-03	bullet to separate original and editing in WorldCat; considerations for CatExpress libraries?	Yes	Institutional policy	MSP-IZ-2
5	MSP-03	ALMA Network Zone (NZ)	2024-04-03	Need to investigate suppressed records in the NZ; need to consider Rialto brief bibs?	Yes	Institutional policy	MSP-IZ-3
6	MSP-04	Floor Bibliographic Standards	2024-05-01	Reduced from two pages to one page, cutting paragraphs down to bullet points; added links to standards; fixed OCLC code	Yes	Institutional policy	MSP-IZ-4
7	MSP-05	Single vs. Separate Records	2024-05-01	Shortened; added additional justifications related to analytics and Dedup/FRBR functionality	Yes	Institutional policy	MSP-IZ-5
8	MSP-06	Provider-Neutral Records	2024-06-05	Removed mention of electronic resources, since they shouldn't be added to the NZ; added a line about electronic resources to the justification	Yes	Institutional policy	MSP-IZ-6
9	MSP-07	Level of PCC Contribution	2024-05-01	Needs a complete reframing; revisit the SUNY funnel	No	Recommendation/ FAQ	
10	MSP-09	Cataloging of Titles on E-readers	2024-06-05	No need for a separate policy; equipment and ebook records covered under MSP-3 as material that shouldn't be in the NZ	No		0
11	MSP-10	Contributing Collections to the CZ	2024-06-05	Content covered in Libguide practices	No		0
12	MSP-11	CZ Activation for Aggregator Collections	2024-06-05	Content covered in Libguide practices	No		0
14	MSP-12	Language of Cataloging	2024-07-17	Rewrote and added more justifications; absorbed part of MSP-13	Yes	Institutional policy	MSP-IZ-7
18	MSP-13	Parallel Cataloging Procedures	2024-07-17	Mostly informational and recommend removing; added one part to MSP-12	No		0
20	MSP-14	In-Process Brief Bibliographic Records	2024-07-17	Removed mention of implementation information and rewrote with further justifications; added additional information about vendor and Rialto-based workflows; added line from MSP-25	Yes	Institutional policy	MSP-IZ-8
23	MSP-16	Syncing Brief Record Encoding Levels	2024-05-01	Recommend combining into MSP-42	No		0
25	MSP-17	Numeric Character References	2024-07-17	Recommend removing; create FAQ on UTF-8 instead	No	FAQ	
33	MSP-18	Minimum Acquisitions Data	2024-08-07	Recommend removing; can't mandate acq workflows	No		0
36	MSP-23	Adding Missing ISBNs to existing WorldCat Master Records	2024-08-07	Suggest creating a best practice	No	Best practice	

Process, continued

- The newly revised policies were presented to the OLIS Advisory Board for approval in early March 2025
- The revised policies were made available in Google Drive and the SUNY community was invited to comment on them throughout March 20205

Current MSP number	Current MSP title	Proposed changes	Proposed MSP number	Proposed MSP title	Degree of changes
MSP-14	In-process brief bibliographic records	Removed mention of implementation information and rewrote with further justifications; added additional information about automated acquisition workflows and absorbed MSP-25	MSP-IZ-8	In-process brief bibliographic records	Significant
MSP-16	Syncing brief levels	Deemed unnecessary as a stand-alone policy and recommend combining into MSP-42 (MSP-NZ-1)	N/A	N/A	Remove
MSP-17	Numeric character references	Recommend removing; rely on FAQ/LibGuide on UTF-8 instead	N/A	N/A	Remove
MSP-18	Minimum acquisitions data	Recommend removing as SUNY doesn't mandate acquisitions workflows	N/A	N/A	Remove
MSP-23	Adding missing ISBNs to existing WorldCat master records	Recommend discontinuing as a stand-alone policy and creating a best practice instead	N/A	N/A	Remove
MSP-25	Overlaying brief records in the Network Zone	Recommend discontinuing as a stand-alone policy; partially absorbed into MSP-14 (MSP-IZ-8) instead	N/A	N/A	Remove
MSP-27	Deleting bare NZ records from IZ	Deemed unnecessary as the configuration of <i>delete_nz_bib_without_inventory</i> parameter makes this policy unnecessary	N/A	N/A	Remove
MSP-28	Working in Alma and the Network Zone	Deemed duplicative of MSP-2 (MSP-IZ-2) and MSP-3 (MSP-IZ-3) and recommend removing	N/A	N/A	Remove
MSP-37	Guidelines for editing PCC	Does not relay local practice and recommend removing	N/A	N/A	Remove
MSP-42	Brief level rules are applied from the Network Zone	Streamlined policy with no content changes to brief rules	MSP-NZ-1	Brief level rules in Alma	Minor/cosmetic
MSP-43	Resolving multi-matches from the daily OCLC loads in the Network Zone	Expanded content to be more inclusive of all the processes happening with OCLC daily loads, which is also reflected in the title change	MSP-NZ-2	Daily Alma bibliographic record updates and management	Significant
MSP-44	Merge rule in the Network Zone OCLC new and updated import profiles	Updated policy to reflect the correct merge rule in use by campuses as well as added contextual information and the merge rule, itself	MSP-NZ-3	Merge rule in the Network Zone import profiles	Significant
MSP-45	Normalization rules in the Network and Institutional zones	Recommendation to adjust the normalization rule to now allow in MARC field 340 (Physical Medium) and FAST subject headings (\$7 fast) [Note: also see MSP-59/MSP-NZ-7]	MSP-NZ-4	Normalization rule in the Network and Institution Zones	Significant



Metadata Standards and Policies Working Group

Committee Members & Charge

Meeting Minutes

Approved Policies

Approved policies

Best Practices

Superseded Policies

Superseded Best Practices

Superseded Charges

Approved policies

- SUNY Minimum Cataloging Subscription
- MSP-1 Bibliographic utility
- MSP-2 Cataloging at the WorldCat level
- MSP-3 ALMA Network Zone
- MSP-4 Floor bibliographic standards
- MSP-5 Single vs Separate Records
- MSP-6 Provider-Neutral Records
- MSP-7 Level of PCC Contribution
- MSP-9 Cataloging of titles on e-Reserves
- MSP-10 Contributing Collections to the Network Zone
- MSP-11 CZ Activation for Aggregated Collections
- MSP-12 Language of Cataloging
- MSP-13 Parallel cataloging procedures
- MSP-14 In-Process Brief Bibliographic Records
- MSP-16 Syncing brief levels
- MSP-17 Numeric Character Reference
- MSP-18 Minimum Acquisitions Data
- MSP-23 Adding missing ISBNs to e-Reserves
- MSP-25 Overlaying Brief Records in Alma
- MSP-27 Deleting bare NZ records from Alma
- MSP-28 Working in Alma and the Network Zone

Metadata Standards and Policies Working Group

Enter Search Word

Committee Members & Charge

Institutional Policies

About the Institutional Policies

MSP-IZ-1: Bibliographic utility

MSP-IZ-2: Cataloging at the WorldCat level

MSP-IZ-3: Alma Network Zone

MSP-IZ-4: Floor bibliographic standards

MSP-IZ-5: Single vs. separate records

MSP-IZ-6: Provider-neutral records

MSP-IZ-7: Language of cataloging

MSP-IZ-8: In-process brief bibliographic records

MSP-IZ-9: Deletions or withdrawals of materials in the Institution Zone

MSP-IZ-10: Local field designations

MSP-IZ-11: Boundwith procedures

Network Policies and Configurations

About the Institutional Policies

These metadata policies support the daily work of SUNY cataloging staff in the Alma Network Zone environment. They are intended to support metadata work that uses shared bibliographic records in the Network Zone.

The SMSP reviewed and renumbered these policies in 2025. The older policy versions can be found in the [SUNY Digital Repository](#).

MSP-IZ-1: Bibliographic utility

Summary:

OCLC will be the primary bibliographic utility used by the SUNY system.

Policy:

Members must use OCLC as their primary bibliographic utility. One of the following cataloging subscription services is required for all members:

- OCLC Full Cataloging Subscription:
 - Allows for holdings to be automatically synced with OCLC
 - Allows the campus to automatically (or batch) update their holdings via an OCLC data sync collection
- OCLC Small Library Edition (for eligible community colleges with fewer than 3000 FTE)
 - Allows for holdings to be automatically synced with OCLC
 - Allows the campus to automatically (or batch) update their holdings via an OCLC data sync collection
- OCLC CatExpress
 - Does not allow for holdings to be automatically synced with OCLC and will require manual updating of holdings in Alma
- Other subscription cataloging services that meet SUNY shared LSP standards

Members must use the OCLC record number as the primary match point when exporting records into Alma, except in cases where a different match point is established to use a different match point

The following types of bibliographic records are not required to contain OCLC record numbers or to have holdings set in WorldCat:

- brief records created for ordering purposes
- personal-copy course reserves
- titles borrowed on ILL from outside the SUNY system
- inventory control of equipment

Policy template



MSP-IZ-2: Cataloging at the WorldCat level

Summary:

SUNY member libraries must make bibliographic record changes in WorldCat and export the updated record into the Network Zone.

Policy:

- Original cataloging of materials whose records would reside in the Network Zone must be done at the WorldCat record level using an OCLC bibliographic utility
- Any edits to bibliographic records in the Network Zone must be made to the WorldCat record using an OCLC bibliographic utility
- SUNY member libraries will prioritize corrections and changes to bibliographic records that enhance discoverability
- Exception: Local notes/extensions are added in the Metadata Editor and will show the icon of a house by the MARC tag. These local notes cover all information which may apply only to a specific copy (such as Special Collections materials), or acquisitions or holdings notes. The [Local Fields](#) document provides more information about what information belongs in these fields

Policy justification:

Because SUNY is using OCLC WorldCat bibliographic records, any original records or edits to records that will reside in the Network Zone must be done in WorldCat. Creating original records and editing records in WorldCat improves discoverability for consortium members.

If an edit is made in the Metadata Editor in Alma, that edited information will be lost when the WorldCat record is exported to replace the existing record in the Network Zone. This export and replace happens when any change is made by any full cataloging member of OCLC, not just full cataloging members within SUNY.

Date of last review: April 2025

Date of next review: September 2025

Date created: April 2025

Project overview

- The SMSP reviewed 33 policies
 - Recommended removing/consolidating 14 policies and keeping 19 policies
 - Minor/cosmetic changes to 6 policies
 - Significant changes to 13 policies
- Reclassified/renumbered policies
- Created a policy template
- Developed a regular review cycle
- Moved historical documentation to SUNY Digital Repository
- <https://sunyolis.libguides.com/mspwg>



Accessibility



Electronic and Information Technology (EIT) Accessibility

- EIT Advisory Committee being reformulated
 - Update of SUNY EIT Accessibility Standards
 - Possible update of EIT Accessibility Policy
- SUNY Inclusion Quest (IQ) Webinar Series - <https://www.suny.edu/udl/sunyyiq/>
 - Prep for Title II Changes
- SUNY Accessibility, Advocates, and Allies Faculty Fellows
 - <https://www.suny.edu/udl/fellowship/>
- Work with OGC on Standard EIT Accessibility Language for contracts, POs, RFPs



EIT Accessibility Advisory Committee Charge

The role of the SUNY EIT Accessibility Advisory Committee is to advise the SUNY Provost's Office and SUNY System Administration on all matters related digital accessibility across the SUNY System, including:

- SUNY's EIT Accessibility policy
- SUNY's EIT Accessibility standards
- Campus EIT Accessibility plans and reporting
- Impact across SUNY of evolving industry standards and relevant NYS and Federal laws and regulations
- System-wide shared procurements and services to support campus EIT Accessibility efforts
- Professional development for faculty, staff, and students
- Funding and advocacy to support campus initiatives



EIT Accessibility (EIT) Advisory Committee Structure

• **Campus Members * (voting)**

- 7 Campus EIT Accessibility Officers ***
- UFS President or designee
- FCCC President or designee
- Student Assembly President or designee
- CAO – Appointed by CAO Exec group (Co-Chair) **
- CIO – Appointed by CIO Exec group (Co-Chair) **
- CDO – Appointed by CDO Exec group **
- Disability Services Officer **
- Library leader **
- Procurement Officer **
- DOODLE Rep – Appointed by DOODLE Exec group**
- CFO CC – Appointed by CCBOA
- CFO State Ops – Appointed by SUBOA
- Standards Subcommittee Co-Chairs (10 - see next slide)

• **System Members (staff support/policy guidance)**

- Assistant Provost for EIT Accessibility
- Snr. Assoc Provost, Digital Innovation & Acad Svcs
- Director of Resources for Students with Disabilities
- Provost's Chief of Staff/Snr Advisor to the Provost
- Executive Director, SUNY Online
- Associate Vice Chancellor for Budget and Business Operations
- CIO Representative
- Office of General Counsel Representative
- SUNY CPD Rep
- OLIS Rep

Kick-Off meeting in June

* Expectation that all reps bring input and report back from their constituency groups

** Need to make sure that between CAO, CIO, CDO, Disability Svc Officer, Library Leader, Procurement Officer, and DOODLE reps half are from a CC and half are from State Ops

*** 2 Doctoral Sector, 1 Comprehensive Sector, 1 Technology Sector, 3 Community College Sector



Reformulation of New Advisory Group

Rationale

- Reset on where we are and what is needed to sustain EIT Accessibility work across the system in support of SUNY's policy
- EIT Accessibility is everyone's responsibility – Need for representation from a wide range of roles on campuses and at System Admin to work with the SUNY EIT Accessibility Officer
- Need a more formal mechanism for making recommendations to the Provost and System Admin on an ongoing basis
- Recommendations should be grounded in the realities on the campuses and engage campuses in how the requirements of the policy are met
- Need a way for the SUNY standards to be reviewed and maintain alignment with NYS laws and Federal regulations



EIT Accessibility (EIT) Advisory Committee Standards Subcommittees

The Subcommittees outlined below are charged with maintaining the SUNY-wide standards referenced in the SUNY EIT Accessibility Policy.

Each subcommittee will be co-chaired by appropriate representatives from both a community college and a state operated campus. Subcommittee Co-Chairs serve on the Advisory Committee and may come from Advisory Committee members or be added as additional members of the Advisory Committee.

The Subcommittees include:

- Web Accessibility Standards (WAS)
- Digital Content Accessibility Standards (DCAS)
- Classroom Accessibility Standards (CAS)
- Library Accessibility Guidelines (LAG)
- Procurement Accessibility Conformance Standards (PACS)



EIT Accessibility (EIT) Library Sub-Committee

- EIT Accessibility Chairs:
 - Rebecca Oling, Purchase
 - Carli Spina, FIT
- Charge to Review Library Accessibility Guidelines. Will also be reviewing the Library Procurement Accessibility Toolkit LibGuide for relevancy.
- Next subcommittee meeting is Wednesday, June 25, 2025
<https://sunyolis.libcal.com/event/14748931>



SUNY AI LibGuide Collaborative

Designed as an AI Resource Repository

- Grassroots librarian-led initiative
- Centralized, curated AI resources for SUNY
 - State standards, policies, compliance
 - Ethics, info literacy, pedagogy, trends, reference
- Regular central updates keep content current
- Campuses can tailor materials locally
- Fosters collaboration and responsible AI use across SUNY
- Debut at SUNYLA - will send further communications later this summer
- Contact Ken Fujiuchi for more information



Proposed Data Governance Working Group

Spin up working group in September/October to review and outline library-specific data governance (one to two year-long working group)

Outcomes:

- Use DLE data-governance document as a model
- Determine what data to collect as a SUNY group
 - Identify high-level areas (Collections, IR, Libraries)
 - Identify important data points
- Determine data security concerns, outline new processes



Functional Update Highlights



ProQuest Databases

- ProQuest – CM03787 is expiring on June 10, 2025
- ProQuest is changing its database offerings going forward
- Analyzed possibility of RFQ for databases that SUNY schools subscribe to that are on the on IFB / OGS contract but too few resources available via RFQ
- Esta reached out to affected schools to let them know
- Please reach out to Theresa Herbst for more information – Theresa.Herbst@Clarivate.com
- If you need a copy of the contract, please email info@sunyolis.com



ProQuest eBook Updates

- Libraries will be able to upgrade ebook licenses via ProQuest ebook Central indefinitely.
- End date for individual ebook purchases and print book purchases – June 2026
- Clarivate will be adding Portico for ebook digital preservation
- Schedule session on ebook and new database packages
 - Still gathering information
 - There may be some interest from University Centers for larger package



Ithaka / JSTOR - ARTstor

- JSTOR
 - Met with business office and JSTOR
 - Will seek single source (CRER) for JSTOR Archival Journals and Primary Sources collection (full suite, not individual collections)
 - Have pricing that reflects next five years – maximum price.
 - Expected pricing now in ATIS
 - Working with Assoc Dir of Licensing to write up justification, pricing
 - Will be sending PIAs
- ARTstor - Contract ended 6/30/2024
 - Still working through whether to extend this contract (5-year additional extension)



Elsevier current contract overview

- Package of ~237 journals, SUNY price = (list price) * 3.4
- Includes 10% APC discount on journals where SUNY-affiliate is primary author
- Includes perpetual access to subscribed years
- 56 campuses participate
- Procured off OGS with additional terms and signed annual order form with title list and price updates



ScienceDirect Task Force

- Entire task force will meet throughout planning to guide direction, as well as meet with Elsevier
- Sub-group for community outreach
 - Solicit feedback on current package and proposed changes
 - Inform community about updates
- Sub-group for data review
 - Guide data strategy for TF work
- Timeline: wrap up task force by end of June



Elsevier Task Force

- Survey indicated not a lot of appetite for larger package
- Crafted and sent needs statement to Elsevier
 - 3-year contract with 2-year extension
 - Asked about transformative agreements
 - Renewal offer similar to current package
 - Broader renewal request for more content

Meeting with Elsevier on June 13



Collections continued

- Updates to FY24/25 Direct Charges finalized this week
- Chronicle of Higher Education (July-June)
- Third Iron / LibKey (July-June)
- StatRef! (August-July)
- SUNYConnect Core EBSCO and Gale amounts now pending in ATIS as well as subsidies
- Updating e-resources SUNYConnect Core and Opt-in resources document for FY26
- SUNYConnect Core PIAs



Professional Development

- [Library Leadership and Management Certificate](https://cpd.suny.edu/LLMCert/) - <https://cpd.suny.edu/LLMCert/>
 - Courses are scheduled
- **2025-26 Spotlight on SUNY Libraries:**
 - If you are interested in presenting, or know someone Cori should contact, please let her know!

Library Assessment	October 7, 2025 – November 17, 2025
Universal Design for Libraries	October 7, 2025 – November 17, 2025
Leading High-Performance Teams	October 14, 2025 – November 17, 2025
Introduction to Project Management for Libraries	January 6, 2026 – February 16, 2026
Developing Academic Library Partnerships	January 6, 2026 – February 16, 2026
Change Management in Libraries	February 10, 2026 – March 22, 2026
Library Strategic Planning	TBD



Discovery & E-Resources

- **Interest Groups:** The next Discovery Interest Group meeting will be Friday, [June 20 at 1 pm](#). The next eResources Interest Group meeting will be Thursday, [June 19 at 10 am](#). We know that these days/times conflict with ELUNA and SUNYLA, but those who are able to attend, feel free to do so.
- **Primo VE AI Research Assistant:** The May 2025 Primo release included these AI Research Assistant updates: ability to filter by availability, removing "Beta" label, Institutional and User Option to Save RA Search History between sessions, and accessibility improvements.
- **New Discovery Experience:** The recording of 5/13/25 Ex Libris Primo VE NDE (Next Discovery Experience) session is available: [Primo VE NDE \(Next Discovery Experience\)](#).



OCLC updates

- Shared OCLC cataloging and First Search data
- Shared WorldShare and Illiad data
- No significant decreases from OCLC for FY26
 - Still waiting on amendment from FY25

Next steps

- Define what we need so we can determine next steps
 - RFP ? Single Source?
 - Ask Resource Sharing Task Group & SMSP to help define needs
 - Work with CUNY



Alma Resource Sharing with the New York State Library

- The New York State Library will be joining Alma resource sharing network as an ISO lender.
- We'll be sending borrowing requests to their ILLiad server directly from Alma, bypassing WorldShare ILL.
- NYSL will continue to send borrowing requests to us via ILLiad/WorldShare ILL.
- NYSL has already been added to the rotas at eight SUNY campuses, and they'll soon be added to the rotas at 42 additional campuses. Updates will be posted to Basecamp.



Alma Resource Sharing Loan Period Policy Changes

- The [proposed changes](#) to our Alma resource sharing loan period policy have been **approved**.
 - New policy: 16-week loan with 2 renewals for all items and all users
 - Borrowing library can shorten loan and/or renewal period if they wish
 - *These changes only apply to Alma resource sharing loans between SUNY libraries.*
- Campuses voted 39-8 in favor of the changes, and the OLIS Advisory Board has given their approval.
- The new policy will be implemented on July 1, 2025.
- SLS will handle all necessary configuration work. Additional details will be posted to Basecamp in a few weeks.



LARS & The Shelf Space Survey

- LARS: For State-operated campuses, June 30 marks the end of the fiscal year. SUNY requires state-operated libraries to complete the annual [Library Acquisitions and Retirement Survey \(LARS\)](#).
- Shelf Space: For state-operated campuses, we'll send a link to the shelf-space survey form in early July.
- Both reports are due the week of August 15.
- If you have any questions or need assistance, please reach out to info@sunyolis.libanswers.com



Cataloging and Metadata

'Games' Resource Type in Primo: A new resource type for board games and tabletop games has been suggested and is available for viewing and testing in the sandboxes.

- Visit any sandbox (such as the [NZ sandbox](#)) and search for a game to see how it displays in the search results and in the resource type facet.
- We will be discussing this further at the next [Metadata Interest Group meeting](#) on Wednesday, June 11 at 1pm.



Institutional Repositories

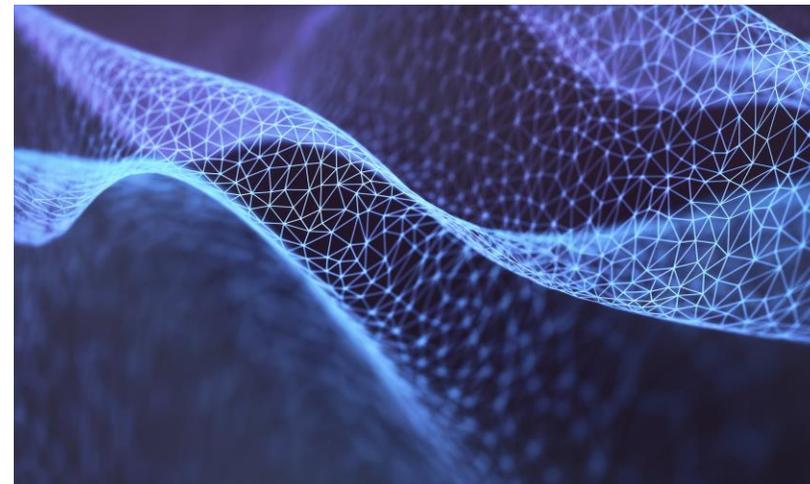
- **SOAR:** Atmire will be upgrading SOAR from a DSpace 5.7 to DSpace 7.6 version of their Open Repository platform.
 - A test instance of the repository to be made available around mid-July.
 - Calling for volunteers to assist with the testing of the platform before we go live.
 - 3-week content freeze during migration, during which no new content can be uploaded. Users will have read-only access.
 - Aiming to have migration take place late summer or early fall, depending on testing and feedback from schools.
- **IR Interest Group:** Join us [June 26 at 10:00 am](#) where we'll be talking more about the SOAR upgrade. The meeting will be recorded for those who aren't able to attend.



The Ethical Web Crawler

In the vast expanse of the digital sea,
Where data flows endlessly, wild and free,
There roams a crawler, with purpose clear,
An ethical bot, spreading no fear.
It treads lightly, with gentle grace,
Respecting boundaries in cyberspace,
Gathering knowledge, but never to harm,
A guardian of ethics, a digital charm.
With algorithms fine-tuned, it seeks to find,
Information to enlighten the human mind,
Yet always mindful of privacy's plea,
An ethical bot, in harmony.
No dark corners does it invade,
No secrets stolen, no trust betrayed,
Transparent and fair, it earns its keep,

In the digital world, where shadows creep.
So here's to the crawler, noble and wise,
Navigating the web with ethical eyes,
A beacon of trust in the data storm,
An ethical bot, in its finest form.





Thank you