

Project title	Alma Automation Workshop
Leader	Kyle Banerjee
Description	<p>Automation greatly simplifies maintenance of data and systems, but Alliance member staff need help learning how to use APIs and more sophisticated Alma functionality to solve real metadata, collection development, and systems issues.</p> <p>Via small interactive workshops, attendees will learn core concepts built around solving real Alliance and member institution problems. In addition to developing valuable skills, member staff will develop stronger relationships with colleagues at other Alliance institutions, allowing them to more effectively leverage and build on each others' skills.</p> <p>A pilot workshop held in the Portland area using freely available facilities was highly rated by participants.</p> <p>Portland is a logical and central point for Alliance functions, but it imposes hardship for staff from some institutions, particularly on members in eastern Washington and Oregon. A workshop in Pullman would be more accessible to staff at EOU, EWU, University of Idaho, Whitman, Whitworth and WSU. This will benefit the Alliance as well as the individual institutions by deepening the technical talent pool.</p> <p>This project funds Kyle Banerjee and Lesley Lowery to lead a workshop in the Pullman area in the late spring of 2020, with remaining funds to support another workshop in Portland.</p> <p>It advances the award objectives in the following ways:</p> <p>Cultivate a strong professional cohort that perpetuates the spirit and practice of collaboration</p> <ul style="list-style-type: none"> ● A major objective of this project is to strengthen connections between staff so they can leverage each others' capabilities <p>Contribute to the growth of innovative and creative projects associated with the Alliance Teams and strategic agenda</p> <ul style="list-style-type: none"> ● The project deepens understanding of technology the Alliance depends on as well as complementary technologies helping staff identify and exploit opportunities <p>Support development of programs, activities, and services that benefit the entire Alliance</p> <ul style="list-style-type: none"> ● The workshop is specifically geared towards NZ and record management with instruction optimized for any automation involving

	Alma. The techniques can be used with any service and directly benefit a wide range of activities at institutional and Alliance levels
Connection to Strategic Plan	<p>This project is tightly aligned with the Strategic Plan. Specifically:</p> <p>Strengthen Member Institutions</p> <ul style="list-style-type: none"> • Builds staff member capacity to relatively easily perform analytical and maintenance tasks that would otherwise be impossible • Maximizes return on Alliance investment in Alma by allowing member staff to leverage automation capabilities to improve quality at lower cost • Builds and leverages expertise at individual institutions enabling them to help the Alliance and each other <p>Improve Access to Information</p> <ul style="list-style-type: none"> • Increases access to physical and digital collections by enabling staff to perform more extensive and more sophisticated data maintenance which in turn improves discoverability and usability of resources <p>Inspire Knowledge Creation</p> <ul style="list-style-type: none"> • Improves infrastructure and expertise to support dissemination of newly created or adapted resources. The techniques have a wide range of applicability which can be used for diverse purposes well beyond Alma <p>Equip Students for Success</p> <ul style="list-style-type: none"> • Improves quality of Summit database making those resources easier to navigate and find, but also provides techniques member staff can use to improve access in other systems.
Budget	<p>Contact and Funds recipient: Kyle Banerjee Transportation: \$400 x 2 = \$800 Hotel: \$100 x 2 = \$200 Per diem: 2 days @ \$55 x 2 = \$220 Food/snacks/refreshments (Pullman): \$390 Food/snacks/refreshments for additional meeting in Portland: \$390 Facilities: \$0 (Pullman and and Portland) Total: \$2000</p>
Marketing and Outreach Plan	<p>The workshops will be advertised via Alliance lists. Given that the last workshop filled to capacity rapidly, there is every reason to believe the people who need to know about these are getting the information.</p> <p>Direct contact with member staff can be used in cases where individuals expected to express interest do not.</p>