

**To:** Shirley Higgins (UCSD), Susan Boone (UCSF), and Germaine Wadeborn (UCLA)  
**From:** Next Generation Technical Services POT 2.1  
**Subject:** Request for Assistance: Lightning Team 2.1.1 on the Current Shelfready Environment  
**Date:** November 2, 2011

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As you know, Next-Generation Technical Services (NGTS) is an initiative developed by the University Librarians and SOPAG to redesign technical services workflows across the full range of library formats in order to take advantage of new system-wide capabilities and tools, minimize redundant activities, improve efficiency, and foster innovation in collection development and management to the benefit of UC library users.

The Power of Three (POT) groups have been empowered to form short-term or targeted groups charged with conducting pilot projects or other specific, well-defined tasks that will assist the POT in completing the deliverables outlined in its charge. Composition of the Lightning Teams will depend on the scope of the task. The POT can tap any appropriate experts from within the UC system with consideration of UC location/geography, campus size and decision-making authority.

As recognized experts in the field, you have been selected to serve on the POT 2.1.1 Lightning Team to conduct an environmental scan of the current shelfready environment both for UC and in the vendor community, and to collect data from UC campuses. Shirley Higgins (UCSD) will be the lead and Linda Barnhart will be your POT2 liaison to facilitate communication and filter questions and concerns. The lead will be responsible for convening the Lightning Team and setting up the email and conference call communications. The details of the tasks and the charges may change, and new tasks may arise that need to be addressed.

For this team, the tasks we've identified are listed below, in chronological order.

**Charge:**

(1) Starting with the HOTS Shelfready Services Task Force Report (attached), please confirm which vendors provide shelfready services (and identify any new shelfready vendors that have come into the marketplace) and obtain current pricing. Compile this information into a list or web page that can be shared and maintained.

(2) Contact the 10 UC campus technical services departments through their HOTS representative (and subsequently through their delegate) to request information about the current state of their shelfready services. Ask them to provide copies of their shelfready profiles and vendor agreements to be shared (only within UC) on the new confidential website. What has changed since the HOTS report? Can they provide additional data about the success (or failure) of their work with various vendors?

Provide the campuses with the list of shelfready vendors and current pricing created above. Ask the campuses to identify new vendors or areas of work that they could explore on their own campus, and ask also about their ideas for systemwide projects for shelfready activity. What are the barriers to moving ahead?

(3) Investigate the possibility and then create a confidential web site (or some other mechanism, if this proves impossible) on which copies of current campus shelfready profiles and/or vendor agreements could be shared within UC. Keep in close touch with POT2 for technical help, if needed. This site should be considered more broadly than an NGTS project site and should continue to assist UC staff when NGTS activities conclude. The vendor information compiled above could also be provided to campuses via this site. Establish this confidential shelfready site for access initially by HOTS, NGTSMT, POT2, and LT 2.1.1 members.

(4) Prepare a brief, summary report of the Lightning Team's activities, to include

- A summary of the current state of UC's use of shelfready services
- A summary of campus and LT ideas about prospective campus and systemwide shelfready services
- Links to the vendor list and campus profiles/agreements
- Recommendations for next steps/future activities, including vendors to pursue or shelfready projects to pilot.

**Target Completion Dates:** February 1, 2012

**Decision/Recommendations:** Recommendations from the Lightning Teams on services to be implemented, staffing models, system-wide policies and standards will be reviewed and approved by NGTS Management Team. These approved recommendations are then sent to SOPAG for decision and approval. As broad policy issues or issues that are determined to be outside the scope of the Lightning Team charge surface, the POT will review and determine course of action.

Please acknowledge your willingness to participate by replying to Linda Barnhart ([lbarnhart@ucsd.edu](mailto:lbarnhart@ucsd.edu)) by November 9, 2011.

Thank you very much.