

To: Matt Conner (UCD), Valerie Bross (UCLA), Jim Clark (UCR), Teri Vogel (UCSD)
From: Next Generation Technical Services POT 5
Subject: Request for Assistance (Recommendation on whether to continue or stop record distribution to campuses)
Date: October 19, 2011

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 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 a POT 5 Lightning Team 1 to assist in gathering data so that POT 5 may make a recommendation on whether to continue or stop record distribution to campuses.

Matt Conner will be the lead and Adolfo Tarango will be your POT 5 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 project tasks we've identified so far are listed below, in priority order, with target completion dates.

Charge:

The Shared Cataloging Program (<http://www.cdlib.org/services/collections/scp/>) currently distributes copies of bibliographic records to each of the ten campuses on a weekly basis. The total number of records distributed each week can vary from a few to thousands of records. The distribution of records to the campuses is done to support various public and technical service functions including: supporting resource discovery through local OPACS, providing the link, via the OCLC number, so that Next Generation Melvyl can display local data (e.g. circulation status), and proving an inventory of a campuses CDL entitlements.

However the record distribution process represents an ongoing workload for SCP and the campuses. Could the resources devoted to this process be better allocated to other tasks? On the

other hand, if SCP stops the distribution of records, might the campuses judge the need for records sufficient so that they would continue, in some manner, to acquire records. By so doing, would the campuses negate or even increase the total resources consumed to support this process?

In an environment where SCP would continue to catalog in WorldCat/Melvyl and continue to attach campus holdings, would stopping SCP record distribution cause problems in campus public services or technical services functions?

Lightning Team 1 is charged to survey the campuses and SCP to assess considerations related to SCP record distribution to the campuses, in particular the impact on public services. As part of its final report, LT1 should:

- Articulate campus and system-wide benefits/needs/challenges/risks of record distribution.
- Develop scenarios that illustrate impact on representative groups, such as technical and public services and users.
- Summarize SCP and campus responses into themes/trends.

CAMCIG has been charged with investigating monetary and staffing costs of record distribution to SCP and campuses, both current state and if campuses choose to add the records themselves (see Appendix A).

Expected Deliverables:

- A report to POT 5 including a recommendation on continuing or ceasing SCP record distribution.

Suggested Resources:

- Heads of Public Services (HOPS)
- Bibliographer groups (e.g. GILS, East Asian Bibliographers)
- Shared Cataloging Program
- Shared Cataloging Program-Advisory Committee
- Local Systems/IT staff responsible for record loading
- UC Cataloging and Metadata Interest Group (CAMCIG)
- UC Acquisitions Interest Group (ACIG)

Reporting:

- Submit monthly status reports to POT 5 Liaison. Format TBD.

Target Completion Dates: 3-4 months from assignment of charge

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.