

To: Jake Nadal, UCLA; Ryan Finnerty, UCSD; Lynne Cameron, CDL; Shonn Haren, UCR

From: Vicki Grahame, SOPAG sponsor for POT 6

Subject: Request for Assistance (Charge): Technical Services Tools

Date: October 17, 2011

## POT 6, Lightning Team 1C

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 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 POT6 Lightning Team to develop and conduct a survey of existing UC shared collection services tools. The data collected from these surveys will help determine the next steps and pilot projects proposed for UC Collections Services Centers.

Your convenor will be Ryan Finnerty. John Riemer will be your POT 6 liaison to facilitate communication and filter questions and concerns. The details of the tasks and the charges may change, and new tasks may arise that need to be addressed.

## **CHARGE**

For this team, the project tasks we've identified so far are listed below with target completion dates.

(1) In preparation for conducting a survey, do an environmental scan\* and develop in conjunction with POT 6 a checklist of tools available to support the full range technical service functions cited in the [POT 6 charge](#). (For a list of ideas, primarily demonstrating the desired scope, please see the end of this charge.)

(2) Survey the UC campuses for both the tools staff have and the ones they feel they lack but need. Compile results, analyze, and summarize findings.

## **TIMEFRAME AND TARGET DATES**

October 15 – Start work

November 4 – Submit checklist for POT 6 review.

November 18 – Send survey out to campuses.

December 9 – Deadline for campuses to respond

January 6 – Submit report to POT 6

Thank you for your willingness to serve UC Libraries in what we believe will be an important step toward improving technical services operations across the campuses.

Please acknowledge your willingness to participate by replying to this email by October 21, 2011.

\*For ideas, you might want to skim the topics covered by Library Technology Reports on Marshall Breeding's site: <http://www.librarytechnology.org/LibraryTechnologyReports.pl>

The following things that can support or improve operations are meant to serve as a definition of "tools":

- Database for recording collection management decisions or inventory
- Integrated library system (innovative, Ex Libris ALEPH, Ex Libris Voyager, OCLC Web-Scale Management System, open source ILS)
- E-resource management system/Link resolver (SFX, Serials Solutions, WorldCat Knowledgebase, home-grown ERM)
- Digital asset management system (CONTENTdm, Fedora, home-grown DAMS)
- Repository services (e-Scholarship Repository, DPR, Merritt, Web Archiving Service)
- Digitization services (mass digitization agencies, in-house digitization equipment)
- Reformatting services (in-house equipment)
- Reporting tools (WorldCat Collection Analysis, RLF duplication checking tool UCB is developing)
- Data synchronization tools that can align data elements that ILS, ERMS, etc. have in common
- Macros
- Batch tools (record loaders, MARCedit)
- Statistical tools (tech services stats, usage stats)
- Reference tools (Cataloger's Desktop, Classification Web, RDA Toolkit)
- Authority vendors (BackStage)
- Acquisitions tools (WorldCat Selection Service, vendor databases e.g. GOBI)
- Financial management tools in support of collection services (interface between ILS and campus financial system)
- PromptCat and shelfready services

