POT 1 Charge

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Charge:
 Build the systemwide infrastructure to support digitized and born digital UC collections

Summary and Background:
The priority actions for the UC Library Digital Collection ("UCLDC") are informed by principles surfaced in the recent work of several groups, including DLSTF1, DLSTF2, NGTS Phase 1 and the NGTS Phase 2 New Modes Task Group recommendations. These principles broadly include: take advantage of existing UC Libraries' technologies, whenever possible, so as to encourage efficiency and collaboration; quickly enable discovery of UC's existing collections while developing an ongoing means of generating and stewarding future resources; and provide a flexible approach that promotes multi-campus participation.

NGTS POT 1 is authorized to proceed with the creation of a UC Library Digital Collection by taking the following priority actions:
1. Select and implement a systemwide Digital Asset Management System (DAMS) for those UC campus libraries that do not yet have one.
2. Select and implement a discovery and display system capable of showcasing the richness of the UC Library Digital Collection.
3. Aggregate existing UC Library digital assets, from all campuses, into a UC Library Digital Collection for purposes of discovery and display.
4. Aggregate existing UC Library digital assets, from all campuses, into the Merritt Repository for purposes of long term preservation.
5. Establish a UC Library Digital Collection Service designed to support and manage the resources and processes relative to the UC Library Digital Collection.

NGTS POT 1 will now proceed with the creation of a UC Library Digital Collection by taking the following steps:
1. Identify the critical requirements for a systemwide DAMS that meets the needs of those UC campus libraries that do not yet have one; conduct an assessment of DAMS options and determine which option will best meet the critical requirements; recommend a particular technology stack and submit funding request to NGTS Management Team.
2. Identify discovery and display system options; determine which will best meet the needs of the UC digital collections; recommend a system and implementation strategy.
3. Develop an aggregation strategy that ensures existing UC digital assets will be available for discovery and display as part of the UC Library Digital Collection.
4. Develop and implement a strategy for ingesting existing UC library digital assets into the UC3 Merritt repository service for purposes of long-term preservation.
5. Propose a structure for a UC Library Digital Collection Service Group designed to support and manage the resources and processes relative to the UC Library Digital Collection, including rights management.

Expected Coordination:
Some of the deliverables and related timelines will require coordination with the work of other POTs and SOPAG:
- POT 3 is charged with the deployment of Archivists' Toolkit into overall technological infrastructure for digital collections.
- POT 6 is charged with defining and implementing UC-wide Collection Service Centers and a system-wide model for Collection Services Staffing and Expertise.
- POT 6 is charged with identifying existing & needed tools being used on campuses that support tech services operations, e.g., DAMS.
- POT 7 is charged with developing and testing scenarios, and recommending strategies for, collecting non-traditional digital collections with a system-wide and multi-campus approach.
- CDC is charged with drafting a UCL Digital Collection Development plan.
- SOPAG is working on the recommendation related to funding commonly held collections and technical service operations from a central source and stable funding for positions doing system-wide work.

Lightning Teams:
Lightning teams (LT) are established for specific well-defined tasks. LTs should be 1) short term, 2) assigned specific tasks with a quick turnaround time, and 3) possess a limited number of members.

Expected Deliverables:
1. UC Libraries DAMS (for those UC campus libraries that do not yet have DAMS technology)
    1. Conduct a technology and user needs assessment of those campuses who do not yet have a DAMS
    2. Draft a DAMS requirements document utilizing the information gathered via needs assessment
    3. Identify and select a DAMS technology stack that meets the requirements document
    4. Develop a DAMS technology implementation plan
    5. Identify costs required for the DAMS technology implementation; if funding required, submit cost document to NGTSMT
    6. Develop and deploy the DAMS technology stack
    7. Initiate a pilot project at select campuses to assess the effectiveness of the DAMS technology stack
2. UC Library Digital Collection discovery and display system
    1. Draft a functional requirements document for a UCLDC discovery and display system.
    2. Identify a potential UCLDC discovery and display system and draft a technical requirements document
    3. Identify costs required for a UCLDC discovery and display system; if funding required, submit cost document to NGTSMT
    4. Develop an implementation plan
3. Aggregation of existing UC digital collections into the UC Library Digital Collection
    1. Identify existing UC collections with potential for inclusion in the UC Library Digital Collection (see DLSTF 1 Appendix 3A)
    2. Identify a technical approach for aggregating UC collections, e.g., vertical crawl, horizontal crawl, etc.
    3. Develop a technology implementation plan
    4. Identify costs required for the DAMS technology implementation; if funding required, submit cost document to NGTSMT

4. Ingest of existing UC digital collections into UC3 Merritt repository
    1. Identify existing UC digital collections with potential for ingest into UC3 Merritt repository (see DLSTF 1 Appendix 3A)
    2. Develop and implement a strategy for ingesting identified UC collections into UC3 Merritt repository
5. UC Library Digital Collection systemwide service team
    1. Identify UCLDC ongoing support requirements
    2. Develop model(s) for the UCLDC systemwide service team, including proposed staffing, roles and responsibilities
    3. Present models to SOPAG / CoUL for consideration and approval

Suggested Resources:
NGTS Project Management Working Group <
https://wiki.library.ucsf.edu/display/UCProjectManagement/Home >
UC Collection Development Committee (CDC) <
http://libraries.universityofcalifornia.edu/cdc/members.html >
CDL UC3 staff < http://www.cdlib.org/services/uc3/about/staff.html >
CDL Mass Digitization Team < http://www.cdlib.org/services/collections/massdig/index.html >
Archivists' Toolkit application development team < http://www.archiviststoolkit.org/ >
OAC Archivists' Toolkit pilot staff < http://www.cdlib.org/services/dsc/contribute/at-archon.html >

Reporting:
Submit monthly status reports by posting to the NGTS wiki, include citing any obstacles. See Status report template.

Recommendation/Decision process:
The POT, having solicited appropriate input and consulted as indicated, makes routine operational decisions including the appointing of Lightning Teams. Recommendations from the Lightning Teams and pilot projects on services to be implemented, staffing models, system-wide policies and standards will be sent to CoUL via SOPAG and NGTSMT for final decision and approval.
Decisions on broad policy issues or issues that are determined to be outside the scope of the POT charge will be referred to SOPAG via NGTSMT for discussion and resolution.

Timeline:
December 1, 2011: Charge and membership finalized by NGTSMT.
February 1, 2012: Submit a proposed task list with milestones (delivery dates) and proposed use of Lightning teams by February 1, 2012. Include how work connects with other interdependent POTs. Include delivery dates.