POT 2-1 Charge

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Charge:
Define and Implement a UC Consortial Shelf-Ready Program

Members:

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Summary and Background: Building on the report of the "HOTS Shelf-Ready Services Task Force," investigate options for UC consortial shelf-ready services. Conduct a consortial shelf-ready pilot for campus monographs and if the opportunity arises, for selected prospective shared print collections. Investigate system-wide authority control and record enrichment options in addition to shelf-ready services.

Assumptions to be tested:

A $1.5 million upfront investment would yield an immediate savings in the second year of operation of $4.7 million, which will continue for every year thereafter.

Budgeted resources can be shifted to cover the cost of shelf-ready operations, as has happened at a number of the campus libraries.

Not all campuses currently have a dedicated or expandable funding source for outsourced services. A funding policy that allows or encourages the use of collection funds to fund shelf ready processing would be expeditious.

Expected Coordination:
This work will need to be coordinated with that of POT 6 which will be addressing UC-wide Collection Services Centers and also with prospective Shared Print in Place activities and CDC's Shared Monographs Coordinating Group. Integrate work of POT 2.2 "Good Enough Cataloging" when defining vendor cataloging standards.

Expected Deliverables:

Near-Term within 6-12 months:
1. Identification of type and quantity of materials to be obtained using shelf-ready services (e.g. approval or firm order monographs, UC prospective shared print collections, etc.). Demonstrate likelihood that shelf-ready services for these materials would bring non-trivial cost-savings to campuses.

2. "Model RFP" for a UC consortial contract for shelf-ready services that can be used with multiple vendors.

3. Best practices and guidelines for efficient workflows necessary to implement a UC consortial shelf-ready service.

4. Vendor selection and start-up for piloting a UC shelf-ready service.

5. Plan for assessing service (to include quantifiable criteria) and effectiveness of UC consortial shelf-ready project.

Longer term:
If near term pilot(s) prove viable, recommendations for expanding shelf-ready services to more collection areas

References and Suggested Resources:
NGTS Enterprise Phase 2 report http://libraries.universityofcalifornia.edu/about/uls/ngts/docs/NGTS2_Enterprise_CS_Final_Report.pdf
HOTS Shelf-Ready Services Task Force report pdf
Shared Print in Place Task Force Report

Consult with: HOTS

Guidelines on using the Lightning Team structure and Project Management Working Group:
POTs may find the creation and charging of lightning teams useful in completing the deliverables outlined above. Lightning teams may be formed by the POTs as short-term groups charged with conducting pilot projects or other tasks with quick turnaround times. Membership of the teams should reflect the scope of the charge.

The POTs may also engage the Project Management Working Group for help in implementing these recommendations.

Questions involving policy-level issues should be referred to the NGTS Implementation Management Team.

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:

- Submit a proposed task list with milestones (delivery dates) and proposed use of Lightning teams by Sept. 2. Include how work connects with other interdependent POTs. Include delivery dates. Include proposed definition of success criteria; should be specific, measurable and achievable]