

POT 5 Charge

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Charge:

Maximize effectiveness of Shared Cataloging

Members:

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Summary and Background: The Shared Cataloging Program has been one of the UC Libraries' most successful collaborative programs. There are several long-term goals for UC in regards to SCP:

- to "scale up" the program in terms of content;
- to maximize the program's effectiveness;
- to ensure long-term funding stability; and
- to develop appropriate governance models so that campuses have sufficient input and control about standards and services.

Assumption to be tested:

Making the investment in expanding the content and scope of SCP will result in a corresponding (or greater) payback.

Expected Coordination:

Some of the deliverables and related timelines will depend on the work of other POTs and SOPAG: SOPAG, which is working on the recommendation related to identifying a database of record (E3) as well as POTs developing a system-wide and Multi-campus Collection development activities (POT 7: E 4) and a model for collection services staffing and expertise (POT 6: E 7).

Expected Deliverables:

Near-Term within 6-12 months:

- Assess the benefits and risks of stopping the distribution of bibliographic records to the ten campuses for their local OPACs.
- Identify other opportunities to streamline current operations to allow SCP to take on new areas of cataloging.
- Work with appropriate groups to evaluate current cataloging priorities.
- Include the cataloging of electronic California documents and open access resources.
- Include the cataloging of electronic federal documents, thereby saving the campuses from separate contracts with Marcive for Documents without Shelves.
- Provide a permanent source of funding for the Chinese language SCP cataloger.

Longer Term:

- Develop a stable funding and governance model that provides accountability to the funders.

References and Suggested Resources:

Enterprise-Level Collections Management Services report:

http://libraries.universityofcalifornia.edu/about/uls/ngts/docs/NGTS2_Enterprise_CS_Final_Report.pdf

Consult with: HOPS and CDC in defining the standards.

- Project Management Work Group (PMWG)
- LTAG as a resource to test technical assumptions
- CAMCIG
- Next Generation Melvyl
- HOPS, CDC for what selectors and users need and for vetting the standard.
- UC Berkeley and UCLA (both use minimal records)
- Vendors

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.

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.

Reporting:

- Submit monthly status reports by posting to the NGTS wiki, include citing any obstacles. See [Status Report template](#).

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.