

# POT 6 Charge

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## Charge: Develop system-wide Collections Services Operations

### Members:

SOPAG sponsor: Vicki Grahame, UCI  
John Riemer, UCLA  
Tony Harvell, UCSD

### Summary and Background:

Develop technical services operations that support collaborative cataloging/processing for UC collections in all formats. What campuses may need can range from something small like the jointly-funded Chinese cataloger in the Shared Cataloging Program all the way up to large-scale shared operations. We need to provide a full range of options for campuses to choose from. As part of this, plan and implement UC Collection Service Centers responsible for all technical services functions selection, licensing, acquisitions, cataloging, preservation, digitization, etc.) on behalf of the UC system. As initial phase, identify and implement pilot projects which will provide the foundation for a comprehensive UC collections services center organization. Based on the experiences of the pilot projects make recommendations concerning next phases.

Investigate and recommend system-wide models for UC-system collection services staffing and expertise. Recommend interim solutions such as evaluating each vacated TS position on in terms of UC-system needs and priorities. Models for shared staffing might be either centralized or distributed.

### Expected Coordination:

Some of the deliverables and related timelines will influence the work of other POTs and SOPAG:

1. Transform Cataloging Practices (POT 2)
2. Prospective shared print activities (SPiP)
3. Shared Cataloging Program recommendations (POT 5)
4. Transform Collection Development (POT 7)
5. Build the systemwide infrastructure to support digitized and born digital UC collections (POT1)

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.

### Assumptions to be tested:

Pilot project experiments have a greater likelihood of being successful if the "centers" self-identify.

This can be a "quid pro quo" activity across UC at least initially, with the expectation that each campus find a way to make a contribution to the greater UC good.

From the system-wide perspective, setting up collection Services Centers are relatively cost-neutral but will require ongoing coordination of TS hiring priorities.

### Expected Deliverables:

#### Nearer Term 6-12 months:

- Coordinate and document existing shared staffing agreements and projects.
- Survey for current and projected campus staffing needs.
- Working group defines "technical services operations that support collaborative cataloging/processing for UC collection"
- Pilot projects of varying scale and intensity and evaluation of results.
- Development of best-practices technical services operations that support collaborative selection,, acquisition, cataloging/processing for UC collections
- Development of common standards and expectations for the projects/centers.
- Identify preferred shared tools to support collaborative technical services.

#### Longer Term:

- Long-term plan for implementing UC Collection Services Centers.
- Model for system-wide collection services staffing

### References:

[http://libraries.universityofcalifornia.edu/about/uls/ngts/docs/NGTS2\\_Enterprise\\_CS\\_Final\\_Report.pdf](http://libraries.universityofcalifornia.edu/about/uls/ngts/docs/NGTS2_Enterprise_CS_Final_Report.pdf)

**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.

**Suggested Resources:** [include sources for Lightning Teams]

- Project Management Work Group (PMWG)
- LTAG as a resource to test technical assumptions
- CAMCIG
- SCP-AC

**Reporting:**

- Submit monthly status reports by posting to the NGTS wiki, include citing any obstacles. See [Status Report template|display/NextGenTechServ/Status+Report|]].

**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.