Informal Consulting Network for Metadata between Columbia and Cornell University Libraries

2CUL TSI Non-MARC Metadata Working Group

2015-03-02

Background

The 2CUL TSI Non-MARC Working Group was first convened in March 2013 as part of the planned 2CUL Technical Services Integration. The group submitted its phase 1 report in July 2013. One of the recommendations included in this report was "the development of a more formalized consulting framework between the two institutions." The recommendation further specified that "this would allow for being able to transfer consultation requests based on expertise requirements. For instance, a Cornell-based consultation request concerning MODS or OMEKA metadata could be transferred to Columbia whereas a Columbia-based consultation concerning VRA Core or Kaltura metadata could be addressed by Cornell."

In phase 2 of the integration process, the TSI Non-MARC Working Group was officially charged to "Develop a proposal for review by the TSI JSMIN for a formal consulting network between the two institutions. Solicit appropriate input from stakeholders outside of 2CUL technical services and incorporate tenets and guidelines from the forthcoming 2CUL governance agreement and any memoranda of understanding developed for 2CUL TSI in early 2014."

With the shift within 2CUL TSI from that of integration to initiative in June 2014, the Group's charge was adjusted accordingly to ask for an "informal" rather than a "formal" consulting network. This structure would allow for the sharing of knowledge between Columbia and Cornell, but, for example, may result in more sharing of expertise as needed for a consultation rather than transfer of actual requests between institutions.

Proposal

Metadata staff at both institutions are involved in a wide-range of projects and consultative services, both within their respective institutions and collaboratively with other entities. We propose that the 2CUL non-MARC metadata staff share knowledge and expertise to enhance their respective consultative services, as outlined below.

Personnel Involved and Expectation of Commitment

Any staff member listed in the documentation may be contacted for an informal consultation; a member of the informal consulting network must initiate contact.

Terminology:
"Initiating" institution and staff should be considered those who initiated the consultation request.
"Advising" institution and staff should be considered those who were invited to participate in a consultation with the Initiating institution.

Individuals unable to assist in a cross-institution consultation due to time constraints or prior commitments should always have the freedom to decline involvement, but should communicate this back to the Initiating institution as soon as possible.

Advising institution staff should send an initial response to a consultation requests within 48 hours.

Recordkeeping

The 2CUL TSI non-MARC Working Group will keep track of cross-institution consultations in a shared document residing in a shared space. Variables to be recorded include:
- Date
- Topic
- Initiating institution
- Initiating staff involved
- Advising staff involved
- Advising staff time spent on consultation
- Actions taken / Resolution
- Consultation Assessment

Limitations

The informal requests should be limited to short consultations, e.g. via e-mail exchange or scheduled phone conversations. Ongoing work that is defined as a "project" (e.g. requires ongoing participation and time commitment) is excluded from this proposal and requires discussion with supervisors to devise a more formal plan for collaboration.

Relevant Documentation:

To allow Initiating institution staff to determine who at the Advising institution may have knowledge necessary for a consultation, both Cornell and Columbia will maintain documents

describing staffing expertise and experience. Working versions for this consultation network will be stored in a shared location, with the consultation records mentioned above.

Documentation of staffing and inventories of expertise should be verified and updated annually, or as needed.

[Non-MARC Staffing and Expertise Document](#)
The staffing and expertise document outlines job descriptions, and a high-level overview of the types of work and projects in which staff are involved.

[Metadata Staffing Comparison Chart](#)
The comparison chart provides a tabular view of both broad areas of job responsibility, such as taxonomy development or creation of metadata guidelines, but also specific areas expertise such as schemas, tools, scripting languages, etc.