

# Charge

## TSI Phase 1: August 2012 - September 2013

The **2CUL Technical Services Integration Steering Committee** shall be formed to oversee the process whereby Columbia and Cornell technical services unify operations as far as possible while identifying local practices and workflows that must remain institution-specific. The Committee will work closely with but remain separate from the **2CUL LMS Implementation Team**.

**Members:** The Committee will be co-chaired by the 2CUL Technical Services Integration Managers, Jim LeBlanc and Kate Harcourt, and include four administrative representatives with backgrounds in Acquisitions, Cataloging & Metadata, E-Resources and Automation: Adam Chandler, Colleen Major, Boaz Nadav-Manes, and Robert Rendall. This structure serves primarily to provide accountability and is not meant to recreate the functional teams that were required in the NOTIS/Voyager migration. The new environment requires a more holistic approach. In actual practice, small groups of staff from all areas of technical services will be asked to consider discrete problems and workflows. For example, a group considering the integration of e-book processing may require input from staff from all four areas.

### Description of Responsibilities:

- Conduct a thorough and systematic review of all existing technical services policies, practices and workflows at each institution with a view towards reconciling them as much as possible.
- Develop and test harmonized workflows.
- Convene discussions and engage staff to conceptualize and build an integrated model for shared technical services operations, using a single LMS.
- Ensure broad staff understanding and acceptance of the objectives, values, and implications of 2CUL technical services integration.
- Advise on staffing changes, reorganization and job definitions. Identify staff competencies needed for success in the 2CUL environment and training needs.

**Decision Authority:** The Committee will report to Bob and Xin but have broad authority to form task groups, initiate pilot projects and determine courses of action that are best for 2CUL when practices differ between the two institutions.

**Minutes and Reporting:** The Committee will create and use a 2CUL TSI [wiki](#) for project communication and archiving purposes, and implement a 2CUL Technical Services alias ([2cultechserv@libraries.cul.columbia.edu](mailto:2cultechserv@libraries.cul.columbia.edu)) for email communication and ask all 2CUL TS staff to subscribe. There will be regular meetings between the TSI Managers and the 2CUL Project Directors.

**Agenda:** The first meeting will be an all day face-to-face retreat. The charge will be discussed and course of action and a work plan will be determined.

## TSI Phase 2: October 2013 - June 2015

### 2CUL TSI Steering Committee: Revised Charge for TSI Phase 2

*Overview.* With the appointment of the 2CUL TSI [Joint Senior Managers Integration Network](#) (JSMIN), the main purpose of the TSI Steering Committee during Phase 2 will be the coordination of those aspects of the Mellon-supported integration project that do not fall into the domains of JSMIN or the TSI Administrative Team, including helping to balance the goals of TSI with the implementation of a shared LMS. Specifically for Phase 2, the TSI Steering Committee is charged to:

- Coordinate the development of 2CUL best practices, guidelines, and policies that will undergird the eventual formal integration in July 2015 and beyond.
- Guide and oversee the creation of shared TSI documentation, wikis, and websites.
- Support the qualitative assessment of the impact of TSI on staff, working with the [TSI Administrative Team](#), as appropriate; coordinate and support the qualitative and quantitative assessment of TSI in regard to productivity and support for library services, in collaboration with the 2CUL assessment leads and others.
- Support and advise the TSI functional working groups and other TSI teams in their current and evolving manifestations.
- Identify staff competencies and training requirements for success in the 2CUL environment.
- Continue to monitor pertinent staff integrations and reorganizations at other institutions.
- Ensure the adequate and effective communication of TSI developments both internally and externally.
- Issue regular reports on its work via the [TSI wiki](#) and through other channels, as appropriate.

The TSI Integration Managers, Kate Harcourt and Jim LeBlanc, will continue to chair the TSI Steering Committee, reporting to the 2CUL Project Directors, Xin Li and Bob Wolven.

*Membership:* Continues from Phase 1