

2CUL TSI Monograph Ordering Working Group

Columbia and Cornell University Libraries order, process and pay for books, DVDs, microforms, and serial back issues from a multitude of vendors using various methods of acquisition. Well over 40,000 items and several hundred thousand dollars' worth of material are ordered every year between the two institutions.

Charge (revised Nov. 2013):

The aim of the Monograph Ordering Working Group is to: (1) examine current policies, practices, and workflows at Columbia and Cornell, (2) working with other 2CUL working groups and library units, propose, develop, and test consolidated and cross-functional workflows, as appropriate. More specifically, the group is charged with:

PHASE 1

1. Compiling an inventory of all policies, practices and workflows related to monograph ordering at both institutions, focusing initially on print items, but thereafter extending to the ordering of material in physical formats other than electronic resources and print serials.
2. Familiarizing itself with the theory and practice of monograph ordering at both institutions;
3. Identifying dependencies and limitations inherent in working with other functional areas in Columbia and Cornell technical services, as well as with other divisions (e.g. collection development, IT) at the two institutions;
4. Reviewing policies, practices, and workflows related to monograph ordering at both institutions to identify points of harmony and points of discord;
5. Establishing baseline productivity numbers for ordering processes and staffing at each institution to allow for future assessment of changes and development associated with 2CUL TSI.

PHASE 2

Originally, the aim of the second stage of TSI was to begin the incremental integration of technical services workflows, practices, policies, and projects. However, with the change in direction for TSI in June 2014, the revised aim of the second stage of TSI is to pursue those collaborative projects and alliances that are most promising with regard to quality, productivity, improvement, and innovation. Based on the findings of the Monograph Ordering Working Group during Phase 1, this means:

1. If the decision to implement 2CUL Alma in 2015 goes forward, work together to develop and adjust workflows in the new system to maximize effectiveness for the integrated technical services operation. If the decision to implement 2CUL Alma is postponed beyond 2015, work together to develop and adjust workflows using our separate Voyager systems to the same end. Test and pilot new ideas, as appropriate, in consultation with staff from the Starr East Asian Library, the TSI JSIMIN group, and the TSI assessment leads.
2. Evaluate options for streamlining joint ordering work that are independent of the decision to implement 2CUL Alma or to increase shared use of each other's Voyager systems. These options include, but are not limited to, the potential use of Cornell's corporate Amazon card to order material for Columbia and sharing a single 2CUL ordering specialist for more difficult/challenging-to-obtain items. Test and pilot these new workflows, as appropriate, in consultation with staff from the Starr East Asian Library, the TSI JSIMIN group and the TSI assessment leads.
3. Prepare a proposal for the 2CUL TSI Steering Committee for increased use of POOF! to further streamline the integrated ordering process.
4. Maintain an inventory of relevant expertise, as needed.
5. Provide input for the creation of a space for shared TSI documentation. Edit and package existing and new monograph ordering documentation for optimal use in this shared space (expected sometime in 2014), keeping in mind the eventual need to distinguish between 2CUL and locally specific guidelines.
6. Provide assistance to the TSI Steering Committee in the form of feedback and, if necessary, data to measure the costs and benefits of all the preceding steps, plus any new 2CUL tasks or initiatives related to this charge. This evaluation will guide future decisions about the practicality of long-term integration of monograph ordering functions and initiatives.
7. Communicate regularly with the 2CUL TSI Steering Committee, through the designated liaison with that group and/or through publicly posted meeting notes, reports, or other announcements.

The group is strongly advised to observe the [Operating Principles for Technical Services Integration](#) throughout its work.

Appointments are for two-year terms and may be renewed. There will be permanent and rotating members on the team. Rotating members will be asked to supply input on documents, results and decisions relevant to their areas of expertise. The team currently consists of the following members:

Leads: Matthew Pavlick (Columbia), Lois Purcell (Cornell -- chair)

Other Members: Pedro Arroyo (Cornell), Sarah Elman (Columbia), Joan Jocson-Singh (Columbia)

Liaison to TSI Steering Committee: Colleen Major

Timeline:

- Phase 1: January – July 2013, culminating in a brief report and possible recommendations.
- Phase 2: January 2, 2014 - June 30, 2015

Meeting Notes:

- [04-23-2013 \(Matt/Lois phone chat\)](#)
- [03-26-2013 \(at Columbia\)](#)

Phase I Report:

- [Final report \(old draft\)](#)
- [Final report](#)

Phase II:

- [Pilot Projects - Draft](#)