

2CUL TSI Non-MARC Metadata Working Group

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Charge (revised Nov. 2013)

The aim of the Non-MARC Metadata 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 to:

PHASE 1

1. Compile an inventory of non-MARC metadata staffing and expertise at both Columbia and Cornell; compare current job assignments -- "metadata librarian" can mean very different things in different institutions. (deadline: April 10)
2. Examine and evaluate reporting and decision-making structures at both institutions. (deadline: May 1)
3. Compile an inventory of all policies, practices, and workflows involving non-MARC metadata activity at both institutions -- including systems and schemas. (deadline: May 15)
4. Identify dependencies and limitations inherent in working with other functional areas at Columbia and Cornell, both within and beyond technical services. (deadline: May 29)
5. If possible, establish baseline productivity numbers for activities and projects at each institution to allow for future assessment of potential changes and development associated with 2CUL TSI. (deadline: June 12)
6. Recommendations regarding a work plan and critical issues to explore in Phase 2 of the group's assignment (deadline: July 25)

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 Non-MARC Metadata Working Group during Phase 1, this means:

1. Begin collaborative investigations and training of new and existing tools and standards for metadata creation and management, with the aim both to reduce net effort.
2. Develop a proposal for review by the TSI JSMIN for an informal consulting network between the two institutions.
3. Coordinate the programs of the Metadata Working Groups at both institutions to permit greater joint engagement in and broader scope for these programs.
4. Provide assistance to the TSI Steering Committee in the form of feedback and, if possible, data to measure the costs and benefits of the collaborative initiatives.
5. 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.

Leads: Melanie Wacker (Columbia), Jason Kovari (Cornell -- chair)

Other Members: Robbie Blitz (Columbia), Steven Folsom (Cornell), Christina Harlow (Columbia), Wendy Kozlowski (Cornell), Hannah Marshall (Cornell)

Liaison to TSI Steering Committee: Robert Rendall

Timeline:

- Phase 1: March - July 2013; report and recommendations to be submitted to TSI SC by July 31, 2013
- Phase 2: January 2, 2014 - June 30, 2015

Phase 1 Final Report

- [Final Report](#)
- [Expanded Section 1: non-MARC metadata staffing and expertise at both institutions](#)
- [Expanded Section 2: Reporting and decision-making structures at both institutions](#)
- [Expanded Section 3: Dependencies and limitations inherent in working with other functional areas at both institutions](#)
- [Expanded Section 4: non-MARC metadata policies, practices and workflows at both institutions](#)
- [Expanded Section 5: Baseline productivity numbers of activities and projects at both institutions](#)

Meeting Notes

- [2CUL_TSI_nonMARC_meeting_notes_20130430.pdf](#)
- [2CUL_TSI_nonMARC_meeting_notes_20130614.pdf](#)

Phase 2

- [Proposal for an Informal Consulting Network](#) (March 2015)