2CUL TSI Monograph Receiving Working Group

2CUL TSI Monograph Receiving Working Group

Charge (revised Nov. 2013)

The aim of the Monograph Receiving Working Group is to: (1) examine current policies, practices, and workflows related to monograph receiving (including approvals, inputting and invoice payment) at Columbia and Cornell, and (2) working with other 2CUL working groups and library units, propose, develop, and test consolidated and cross-institutional workflows, as appropriate. More specifically, the group is charged to:

PHASE 1

1. Compile an inventory of monograph receiving staff and expertise at both Columbia and Cornell; compare current job assignments.
2. Examine and evaluate reporting and decision-making structures at both institutions.
3. Compile an inventory of all policies, practices, and workflows involving receiving activities at both institutions-- including which unit or department is responsible for which activities.
4. Identify dependencies and limitations inherent in working with other functional areas at Columbia and Cornell, especially in regard to any work performed in unit libraries and automated aspects of monograph receiving.
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.

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 Receiving 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 JSMIN group, the TSI assessment leads, and other 2CUL functional areas (such as accounting and finance).
2. Collaborate with TSI JSMIN, other TSI working groups and representatives from other 2CUL departments and divisions, as appropriate, to explore the further use of current labor-saving receiving methods such as shelf-ready and cataloging-on-receipt.
3. Compile an inventory of all policies, practices, and workflows involving gift receiving activities at both institutions.
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 receiving 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 receiving 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.

Leads: Matt Pavlick (Columbia--Chair). Lisa Maybury (Cornell)

Other Members: Pedro Arroyo (Cornell)

Liaison to TSI Steering Committee: Jim LeBlanc

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

Meeting Notes

Phone Call Notes - May 16, 2013

Phone Call Notes - January 14, 2014

Working Group Report

2CUL Documents

Columbia Documents

Cornell Documents