

Occasional Progress Report - Latest (testing copy)

This is a copy of the Occasional Progress Report 7 -- August 27, 2013. Xin is using it to test a function.

Hi everyone:

Here's the latest on what's been happening with 2CUL Technical Services Integration (TSI). This report, along with past updates, is also available in the [Project Reports](#) section of the TSI wiki.

1. All the TSI Functional Teams have finished their reports! Over the coming months we will be synthesizing data and commenting on specific recommendations. For now let us just say how impressed we are with the hard work and careful thought that went into the reports and thank everyone who participated! The reports are available on the [wiki](#). To look at a report, go to the Functional Areas and Teams box on the left hand side and click on the desired functional area. Monographic Ordering, for example, may be found on the Acquisitions page.

2. Cornell (Jim, Adam and Boaz) came to Columbia for a TSI Steering Committee meeting on August 22-23. Our agenda topic was to begin to understand the amazing data collected by the Functional Teams and begin to plan for phase 2 of the integration. Our strategy was to begin by brainstorming about what jumped out at us from the reports and note those things on flip charts. We then ranked the ideas and then formed a matrix which ranked the top ideas by various attributes relating to the feasibility of integration. The process was fun, frustrating, exhausting, illuminating and confusing but ultimately we think we see a way to move forward. We will be submitting a report of our conclusions and recommendations to the 2CUL Project Directors (Bob and Xin) for input before circulating the plan more publicly.

Flip charts, highlighters and matrices, oh my!

Criteria	MD	MR	PS	BP	CC	OC	DM	NMH	E
1 Div. C	N.F.	N.F.	Factor	Factor	N.F.	N.F.	Factor	N.F.	N.F.
2 ready cultural	high	med	low	med	med	med	low	high	med
2 shared system	med.	high	high	low	high	high	high	low	high*
1 X-train is. specialized	Factor	Factor	Factor	Factor	Factor	N.F.	Factor	N.F.	Factor
2 eff.	high	low	med	high	low	low	low	med	high
1 tools sim.	Factor	N.F.	N.F.	Factor	N.F.	N.F.	N.F.	Factor	Factor
5 2 1 4 2 3 1 6 3									

3. TSI had a phone conference with MIT about their reorganization which was largely based on a change from an organization based on function to one based on workflow. As we've been discovering, technical services mergers and reorganizations seem to all be idiosyncratic to the institution(s). In MIT's case, they have deprioritized the processing of physical material in order to give greater focus to electronic and digital assets. They also aimed to reduce workflow handoffs, and staff assignments are now more specialized than they've been in the past.

4. The TSI Administrative Team is considering various ways of assessing attitudes toward 2CUL, including the possibility of a staff survey sometime this fall. Colleen Major and Boaz Nadav-Manes will be working with Nisa Bakkalbasi (Columbia) and Zuzsa Koltay (Cornell) on this aspect of TSI.

5. Alena Ptak-Danchak, who was the Director of the Columbia Health Sciences Library, was in town this summer and was interested in 2CUL. She prepared a [report](#) with her observations.

That's all for this time. Stay tuned for more information about Phase 2. As always, please feel free to direct questions to your supervisors or to any member of the TSI Steering Committee: Jim LeBlanc, Adam Chandler, Colleen Major, Boaz Nadav-Manes, Robert Rendall, or me.

- Kate Harcourt (on behalf of the 2CUL TSI Steering Committee)