

2CUL TSI Cataloging Working Group

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Charge (revised Nov. 2013)

The TSI Cataloging Working Group represents a merger of the Original Cataloging and Copy Cataloging Working Groups from Phase 1 of TSI planning. The aim of the Cataloging Working Group in Phase 2 is to propose, develop, and test consolidated and cross-institutional workflows, as appropriate. More specifically, the group is charged to:

PHASE 1 (Original and Copy Cataloging Working Groups)

1. Compile an inventory of copy and original cataloging 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 copy and original cataloging 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 copy and original cataloging.
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 Original and Copy Cataloging Working Groups during Phase 1, this means:

1. Work together to develop and adjust workflows to maximize effectiveness for the integrated technical services operation. Test and pilot new ideas, as appropriate, in consultation with staff from the Starr East Asian Library, the TSI JSMIN group, and the TSI assessment leads.
2. In consultation with the 2CUL JSMIN and other divisions of the 2CUL libraries (including Collection Development), develop a means to better plan for and assess the impact of collaborative collection development and changing collection priorities on 2CUL cataloging workload.
3. Develop and/or coordinate 2CUL cataloging policies and standards jointly within a framework that will accommodate differences due to contrasting collection priorities and service expectations, including rare books and other workflows which may be outside mainstream cataloging at one or both institutions.
4. Identify, test and evaluate areas where collaborative cataloging either makes economic sense or is necessary for other reasons.
5. Evaluate options for jointly developing skill sets or specialist catalogers in emerging areas such as big data, born digital rare material, web archiving, etc. Maintain an inventory of relevant expertise, as needed.
6. In collaboration with other TSI working groups and department directors, develop a means to identify and evaluate vendor services of potential interest -- such as vendor-supplied cataloging, shelf-ready processing, and vernacular data. When appropriate, engage in joint negotiations with vendors and establish common service expectations.
7. Coordinate joint 2CUL representation in external bodies (e.g. CONSER) and associated activities, including reporting and voting.
8. Provide input for the creation of a space for shared TSI documentation. Edit and package existing and new cataloging 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.
9. In collaboration with TSI and other working groups (e.g. Blacklight teams), investigate system-related services related to batch processing, reporting, troubleshooting, and their impact on workflow.
10. Collaborate on cataloger training, as appropriate.
11. Foster appropriate channels of communication for sharing of information, consultation, and decisionmaking.
12. 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.
13. 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: Chew Chiat Naun (Cornell -- Chair), Irina Kandarasheva (Columbia)

Other Members: Russell Merritt (Columbia), Sarah Ross (Cornell), Pam Stansbury (Cornell), Melanie Wacker (Columbia), Sarah Elman (Columbia), Cynthia Rich (Cornell), Susan Summer (Columbia), Pedro Arroyo (Cornell)

Liaison to TSI Steering Committee: Kate Harcourt

Timeline:

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