

# Team Leaders Quarterly Meeting July 15, 2014

2CUL TSI Working Group Chairs and Leads Quarterly Meeting

7/15/2014 - 10:00-11:00 AM

Topic: the eight-point plan for a change of direction in TSI: see the "Action Plan and Rationale" in the brief document [From Integration to the 2CUL Technical Services Initiative](#)

We addressed the questions below.

Questions:

## 1. What additional guidance do the working groups need from JSMIN?

The proposal to move from Integration to Initiative has been approved by 2CUL Steering.

Do the tasks in the charge still apply to the groups? Are we revisiting our charges?

Should the chairs amend these charges? Working groups are encouraged to participate in this regard. Non-MARC Metadata group has done some of this and has combined some tasks, e.g., broadened the scope of the proposed environmental scan.

No longer having a mandate to integrate impacts all groups, but may mean different things. Some pressure is gone now that we are working on truly productive projects, not projects for the sake of becoming one department. Some groups may suspend activities until perhaps a new system is implemented.

Many e-resource tasks do not depend on integration, but may impact the barriers outlined above. They may push the limits on staffing and financial barriers.

Work on global changes and CONSER representation were noted as examples of successful initiatives.

We decided that the scope of project work is so broad that we will look at each new initiative on its own merits (4 drivers) and not try to write a charge or guiding documentation to cover all aspects of work. The vetting mechanism most often will occur within the group, e.g., the work that was done to justify Serials Solutions Consortial Edition or Callisto. The fewer sign offs the better.

We need to remember that 2CUL work is successfully happening in other areas, e.g., selection.

We may need to redefine JSMIN as an oversight group rather than an administrative group. JSMIN may have a role in prioritizing work across departmental lines. The liaison relationship is considered key in planning and carrying out initiatives. They can seek guidance when needed from JSMIN. Jim and Kate may continue to push problems up to Bob and Xin.

Database maintenance envisions this work more difficult without a shared catalog

Print serials is mostly sharing information

Print receiving sees more opportunity with a shared catalog.

## 2. What does this change of direction mean for the TSI working group structure? Does the current structure still make sense?

Much of this came out in the previous discussion.

MARC cataloging questions the given structure for the group, as it will be considering many cataloging initiatives (BibFRAME, for example). Group can be more ad hoc based on what project it is considering. Work with Lois on documentation may go across teams.

More targeted project level initiatives rather the group based integration.

## 3. What does the change of direction mean for our ability to recruit staff from outside of technical services for collaborative projects?

NON-MARC relied on some assistance from other departments that was not forthcoming

Batch Processing also felt this to be true with LS tools, but not so with Global Data Change.

Should there be greater representation from other departments in the libraries? Still, the time demands on them is difficult. (LDPD, LITO, etc.)

Has there been a drop off in willingness from other departments after the announced change?

This concern will be shared with 2CUL Steering.

## 4. How can we continue to generate momentum for TSI ideas, projects, and alliances that will benefit both of our institutions?

The teams are still a good place to generate new projects and ideas. Always have the other institution in mind when considering new projects.

Keep in mind that 2CUL is still active in collection development.

Without a shared LMS, there is no driving need that would prove a good collaboration environment, where are we now with this removed? Does the more relaxed time line offer opportunities?

Vote taken indicates that most believe we would have more opportunity for collaboration with a shared LMS. How? Receiving, EDI? Collection development considerations. There are areas where we do this without a shared LMS. Do we know what we would really gain by sharing a system? Would it make more sense to have a shared instance or independent instances of ALMA?

Lois and her work on documentation. How are our procedures in all groups compare and how are they described. Working together in this area might prove informative, but is this still important without integration? Lois is compiling spreadsheet of documents between organizations, comparing naming of and linking to workflows and processes.

For batch jobs, understanding of each others data is essential.

Working together on new workflows may be most beneficial. Streaming video is an example of working on a new workflow jointly.

Training documents, such as RDA, that does not pertain to LMS functionality is a good area to share information.

Flexibility in group composition and information sharing on specific projects would be helpful.

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#### **Addendum: next steps (7/23/14)**

1. Functional working groups should continue to pursue ongoing work and new ideas that are likely to yield mutual (or net) benefits for our libraries. Working groups should feel free to combine personnel, as needed or desired and as situations require, though formal restructuring of the groups at this time would be premature. Better to let the continuing TSI work drive changes in the model, rather than vice versa.
2. Clearly we need a strong voice in system selection, migration, and implementation, especially since for many working groups TSI is dependent on whether or not we implement a shared system and what kind of shared functionality that system will provide (or inhibit).
3. Kate and I will work on updating the top pages of the TSI wiki to account for the recent "pivot," recommending changes to the individual pages and making those changes on behalf of the teams, if requested. Beyond that, we recommend that the working groups continue to use their wiki pages as they see fit.
4. We ask everyone in JSMIN to take responsibility for pushing Technical Services *Initiative* work forward, as time and resources permit.
5. Kate and I will begin work on step #5 in the [action plan](#), initially with a pilot project in consultation with a single working group. More on this soon. Since it is Kate and I who have made (or who have had made for us) the formal 35% time commitment to TSI thru 2015, we will continue to shoulder the largest portion of this research burden, though we will probably need to pull others into the effort at some point.
6. Kate and I will also begin work on step #6 in the [action plan](#), initially by following up with our KenDen and BookOps contacts.