

2015-03-11

Notes from the TSI Administrative Team Meeting, March 11, 2015

Nisa Bakkalbasi and Zsuzsa Koltay, the TSI Assessment Liaisons, joined Kate, Jim, Xin, and Bob for a continuation of the [discussion begun on Feb. 17th](#).

We reviewed the goals of TSI, as we recently updated them for the 2nd year project report to Mellon (see below), to determine how best to assess TSI at the conclusion of the grant period: for Mellon and for ourselves. We also talked about the role we envision for JSMIN.

Regarding the revised Goal 1 for Mellon, we identified three kinds of questions we should answer for each of the bullet points, keeping in mind the four drivers (quality, productivity, improvement, and innovation): (1) whether we completed or did not complete the task, (2) whether we generated savings or cost avoidance, and (3) what is the value of having completed, or at least worked on the task, for 2CUL. In addition to any empirical data we're able to collect, we also considered the idea of interviews with leads for each of the tasks, possibly in conjunction with "journals." Although we will need to flesh out these last ideas further, we could conceivably use the "[TSI Goals for 2015](#)" to-do list in Basecamp to address the journal-keeping aspect of this kind of assessment, especially if we keep the three-part assessment strategy in mind. This would also allow us to evaluate both the goals we've made explicit for Mellon and those we're interested in exploring for ourselves. Kate and Jim will solicit some input from JSMIN in the group's next meeting on 3/12.

Regarding the revised Goal 2 for Mellon, we will reissue the TSI staff survey, adjusting its context and wording somewhat to reflect the shift from integration to initiative. We do want to stick as closely as possible to the perceptions and attitudes we aimed to measure in the initial survey. We also talked about scheduling the survey as close to the end of the project as possible, or even just after the project is complete.

Nisa and Zsuzsa will review these ideas and get back to us.

Addendum: From the 2nd year report to Mellon on TSI:

Goal 1 (Revised): Reconceive library operations at each campus to achieve a formal alliance of technical services operations in which staff undertake investigations, projects, and other collaborative assignments based on four driving factors: quality, productivity, improvement, and innovation.

Although eschewing formal administrative integration of their two separate operations, 2CUL technical services staff will achieve the following in the third and final year of the project:

- Implement a shared workflow for those aspects of e-resource management that can be addressed collaboratively in separate, but similar ERM systems, including joint troubleshooting of access problems and joint management of shared data and contacts.
- Working with collection development staff, develop and implement guidelines for negotiating, as 2CUL, with material vendors to ensure maximum leverage from the collaboration.
- Participate together in the development, testing, and implementation of the BIBFRAME model for bibliographic data exchange, as well as related linked data initiatives, to leverage the expertise and capacity of the 2CUL technical services alliance.
- Expand collaborative support for non-MARC metadata projects and initiatives, including web archiving.
- Complete and publish, either internally or in a national forum, a study of the disparate workflows for print serials processing at the two institutions. Establish a methodology for future research of this type within 2CUL or beyond.
- Work together on the technical services aspects of the evaluation and implementation of a next-generation LMS, should this work begin in earnest in 2015.
- Measure the success of the foregoing aims, based on the degree to which they improve the quality, productivity, improvement, and innovation in technical services in support of the 2CUL collections.

Goal 2: Ensure that all technical services staff on both campuses understand and embrace 2CUL as an institutional goal and view inter-institutional collaboration as part of normal library operations.

As the alliance evolves, the libraries will necessarily involve more and more staff in the collaborative investigations and discrete projects that will come to characterize TSI. The foundation that the TSI planning team has already laid, especially in the creation of multiple functional working groups and support for the middle-out approach to TSI, will support this evolution well. The collaborative work in other areas of our libraries, such as collection development and shared access to resources, inevitably impact the workflow and mindset of staff. With the help of our respective assessment leads, we also plan to conduct another assessment in which we will benchmark changes of staff perceptions and attitudes towards the project. The results will also help the two libraries to assess staff's preparedness for further collaboration.