Orbis Cascade Alliance
Collaborative Technical Services Team
Beginning Reflections
February 12, 2010

We Are a Team:

CTST is the successor to CTSTF.   The acronyms are identical save for the final letter, but this detail contains an important symbolic difference.   Whereas the first group formed a "Task Force," the second group is constituted as a "Team."   Wisegeek.com provides the following, succinct definition of a task force: "a group of people who are temporarily assigned to work together to achieve a very specific and clearly defined objective." The charge to CTST clearly encompasses the work of a task force, seeing that the Alliance Council has asked the group to advance four "specific and clearly defined" initiatives.   Yet, the word "team" suggests something more about our group.   I'd like to suggest that this additional component centers on the expectations of the way(s) that the members of the group will work together. From my perspective, the word "team" distinguishes itself from the phrase "task force" by holding out an explicit expectation that every member can be counted on to do his or her part of the work and be relied on to complete tasks and work cooperatively with other members of the team.   A team therefore is "a group of people working together [that] can achieve much more than if the individuals of the team were working on their own."   One can certainly expect and hope that a task force will operate in the same manner, but with a team, the hope and promise is built right into the name.

Why is this even important? Well, CTST is being asked by the Council to lead a movement toward team-based technical services among Alliance libraries.   In contrast to the current duplication of operations and workflows across the consortium, CTST has been charged to implement four working groups (i.e., teams) that will collaborative across institutional boundaries to: create a vision for the best ways to operate within a shared ILS environment; develop a team approach to supplying metadata for e-books; implement a system for sharing foreign language cataloging expertise; and organize a consortial approach to the retrospective cataloging of pre-1976 government documents.   The first Task Force came up with the ideas and laid the foundation.   The second group is now asked to take these ideas to the team level.

CTST Discussion:

What Do We Know?

As noted, the groundwork has been laid by CTSTF.   The group's "Report to the Alliance Executive Committee" dated October 9, 2009 is required reading (our sacred text).   Taking this document, together with the CTST charge, we know several things:

- Council wants collaborative technical services to move past planning and discussion into action
- Council wants to see progress on multiple fronts, having adopted all four major proposals put forward by the CTSTF
- Council tightened the scope of the primary recommendation, charging CTST to focus on developing guidelines "for effective technical services policies and operations that support the

Alliance goal of a shared ILS."   This is different than "developing best methodologies for ordering, cataloging, and processing library material" in general

- Council wants to receive a final report on the pilot projects with recommendations for next steps in advance of its meeting in November.   This means getting the report to the Executive Committee by mid-October

CTST Discussion:

What is in the Charge?

The charge calls for CTST to beget four other team based entities to accomplish certain ends.   With respect to developing guidelines for working in a technical services environment with a shared ILS, CTST is asked to set up a group to perform this work.   With regard to e-books, CTST is create another group to come up with the procedures, workflows, etc. to catalog and process a shared electronic resource purchased by the Alliance on behalf of the Alliance.   Where foreign language materials and pre-1976 government documents are concerned, CTST is asked to bring core groups of libraries together to perform cataloging on behalf of the consortium.   So, the charge calls for the creation of two committees that will research, discuss and make recommendations and two pilot projects that actually test the ability of some libraries within the Alliance to collaborate on cataloging and processing certain types of information resources.

CTST Discussion:

What is the Best Organizational Structure?

CTST can approach its work in several different ways.   The team could work as a committee of the whole, taking direct responsibility for each aspect of the charge.   The team could operate like a steering committee, parceling out responsibility for each aspect of the charge to other groups of individuals as yet unnamed. CTST could also "mix and match" by supplying a liaison (or two) to separate groups where needed and it could also take direct responsibility for the parts of the charge that make sense given the expertise represented on CTST.   This question asks CTST to consider who needs to be involved given the nature of the work.   Our group may do well to consider the words of Jeff Young, OCLC, (commenting on the article [Accept Defeat: The Neuroscience of Screwing Up](#)), "When you have a problem to solve, it's far more productive to assemble a team of people with widely diverse backgrounds than a group of 'experts' with shared assumptions."

CTST Discussion:

The Charge Dissected:

Charge #1:   implement a Shared Best Practices working group to develop guidelines for effective technical services policies and operations that support the Alliance goal of a shared ILS.

Our predecessor, CTSTF, made a broad recommendation that a group be charged to "make tech service operations more efficient by developing best methodologies for ordering, cataloging, and processing library material." Council accepted this recommendation but helpfully narrowed the scope of work. We are to focus on developing guidelines for use in an environment where Alliance libraries shared an integrated library system.   So, it's not just best practices for cataloging, but rather best practices for cataloging when everyone contributes records to a central bibliographic database.

This aspect of the charge calls for some research, thought and analysis.   Fortunately, the final report of the Shared Bibliographic Database Task Force provides an excellent place for this group to start.   My own impression is that, for the purposes of our work, Council is embracing "Scenario 3: One Shared ILS for the entire Alliance." This section of the final report does a nice job of posing "Questions and Concerns" related to one shared ILS.

If, as the charge to the Shared ILS team states, "'Technical services' is shorthand for those library operations most directly associated with acquisitions, cataloging, discovery, access, and technical support for ILS functions," the CTST group will need participants with a variety of expertise and knowledge.

CTST Discussion:

Charge #2: implement a working group to develop technical services operations that support collaborative cataloging/processing for e-book collections.   This working group should coordinate their work with that of the e-book team.

"Proposal #2" in the CTSTF report provides insight into what will be involved in accomplishing this aspect of our charge.   To me, this looks like an interesting assignment for cataloging/metadata folks with an interest in batch record loading.   We should talk about whether the expertise already resides on CTST or whether it will be necessary to recruit the metadata management skills that will be needed.

CTST Discussion:

Charge #3: implement a core group of libraries committed to a pilot project to organize an exchange of expertise for collaborative cataloging of Difficult Foreign Language Material.

As "Proposal #3" in the CTSTF report indicates, there will be an initial need to gather data about foreign language cataloging expertise within the Alliance, the capacity to share those skills and the willingness to engage in collaborative efforts.   A likely group to target by survey would be the heads of cataloging at each of the Alliance libraries.   SurveyMonkey would probably work well for this purpose.

After data gathering and analysis, a pilot project (or two) will need to be set up.   Whether the pilot projects attempt to address the issues around incentivizing the process (cf. ABS – Alliance Bartering System, p. 6 of CTSTF final report), is something that should be discussed.   It's hard to imagine long-term success in this area where "collaborative cataloging" simply turns out to be additional workload for libraries willing to share language expertise.

CTST Discussion:

Charge #4: implement a core group of libraries committed to a pilot project to organize an exchange of expertise for collaborative cataloging and identification of Pre-1976 Federal Documents Holdings in the Alliance.

This project will require the involvement of technical services librarians and their colleagues who work in government documents.   The latter group will most logically produce information about local library holdings and assist the technical services folks with dividing up responsibility for cataloging.   Given the relative ubiquity of Federal information in libraries, this pilot could involve more participating libraries than the pilot for cataloging foreign language material.   In contrast to that pilot, libraries will work on cataloging materials in their own collections rather than sending materials elsewhere.   Like Charge #3, this part of the charge may benefit from the use of SurveyMonkey to gain answers to questions about holdings, cataloging capacity, etc.   CTST should consider the possibility of combining the two surveys.

CTST Discussion: