Collaborative Technical Services Team (CTST)
Progress Report for the Alliance Executive Committee & Council
June 2010 – Prepared by Mark Watson on behalf of CTST

CTST has met two times since its initial face-to-face kick-off at PCC in February 2010 (April 9 and May 28). The group is using Elluminate meeting software hosted by Lewis & Clark. The software has a powerful array of features and accommodates audio, chat, video and document manipulation.

Guidelines for Collaborative Technical Services (Lead: Mark Dahl, Lewis & Clark)

For CTST's first meeting, Mark Dahl prepared a whitepaper for discussion. In looking at specific areas of technical services activity that would lend themselves to best practice guidelines, it will not come as a surprise that cataloging seems to be the natural place to begin. Cataloging is an area where national standards already exist and can be applicable in a WCL/Navigator-type setting or within an environment where consortia members share a system like Millennium. The group has identified several things that will need to be addressed in this area:

- Levels of cataloging and record fullness
- Single or multiple records for participating libraries
- Method for authority control
- Third party records and associated license terms

CTST has also embraced the idea of laying out best practices that Alliance libraries can begin to use prior to implementing the shared ILS. Beginning to make changes now might assist in selecting a new ILS, and it would certainly help maintain a pragmatic as opposed to theoretical approach. The adoption of a shared ILS will also be made much easier, no matter how long it actually takes to bring that result about.

Acquisitions is an area where the group needs to do more data gathering. There is considerably more variation in the way libraries approach this work. It may be possible that this effort could bolster the continuing shift to YBP/Gobi services. Although there are different ways to implement a Gobi workflow, having the system in common would certainly open the door for more uniformity in local practices. In a shared ILS, it would be necessary to reconcile the myriad ways that location codes, fund codes, selector names, etc. are tracked in the system. Another approach might be to separate the acquisition modules within the same system. This happens at both Lewis & Clark and the UO where the Law Schools share a Millennium system and have their own acquisitions module.

At its second meeting on April 9, CTST concluded that more background research on shared technical services practices is in order. It will help to see what other groups working in a shared ILS actually do. Mark Dahl offered to continue his work in this area. He reported back on May 28 on the activities of six consortia: Georgia Public (Evergreen), SAGE (Eastern OR), Tri-College Consortium (Philadelphia area); Five Colleges of Ohio, Five Colleges of Massachusetts, and the California Digital Library cataloging group. Although he uncovered some interesting information, Mark said that he did not uncover a readymade model to follow. CTST was going to need to think creatively. He noted that the real impetus for action will come when and if the Alliance libraries attempt to merge their bibliographic databases. Dealing with the fallout will immediately determine the need for some best practices. The group decided that a thought experiment might be in order. CTST will spend some time thinking about the implications of merging the databases and then create of list of major issues that will need to be dealt

with.   Mark also agreed to ask the other consortiums for any written documentation that they are willing to provide.

E-Book Cataloging (Lead: Mark Copsey, Walla Walla University)

To date, CTST has been monitoring the activity and progress being made by the E-Book Team chaired by Emily McElroy, OHSU.   Once the purchase model is developed, CTST can push ahead with creating a workflow for processing.   The group spent some time discussing some questions for the E-Book Team to use in its upcoming meeting with e-book vendors/aggregators on June 9.   One key question is whether the vendor has the ability to upload records to OCLC and set holdings.

Non-English Cataloging (Lead: Mark Watson, University of Oregon)

CTST developed a survey that was sent to staff responsible for cataloging operations in Alliance libraries. The results were discussed at the May 28 meeting.   Somewhat disappointingly, the results show that no library in the Alliance has anything beyond a minimal capacity to help out with additional foreign language cataloging. Still, there is clearly a need for assistance with original cataloging even if the resources in the consortia are spread very thin.   The group decided to make the results of the survey known and to proceed along the lines of creating a directory that library staff could use for advice and/or consultation in connection with their foreign language cataloging needs.

Government Documents (Lead: Julie Christerson, Pacific University)

Julie has pushed ahead on this part of the charge with energy and enthusiasm.   She has convened a small group to assist with developing recommendations for cataloging pre-1976 documents.   OCLC has a collection set for this group of materials. It needs work and there is a possibility that Alliance libraries could cut a deal to upgrade and/or contribute records in exchange for a price break. OCLC probably also needs to do a new pull of records for this set. The Congressional Hearings are clearly the top priority for cataloging.   Julie said it would be important to survey Alliance members to find out what documents should be considered after the Hearings.   The UW has been working steadily on a project to catalog the pre-1976 materials. Julie and her group will look at piggy backing on their work.

CTST Personnel:

Jeff Ring has informed CTST that he has taken a new position as Library Director at Mt. Hood Community College.   With the transition to the new position, he has been unable to participate or attend the past two CTST meetings.   In his last communication with the group (4/28), Jeff said that he wanted to continue; however, it seems advisable that the Executive Committee review the situation, confirm Jeff's wishes and decide if the new Council member should stay on as a CTST committee member.