

Progress Report to the Executive Committee

February 2010

Collaborative Technical Services Team

The Collaborative Technical Services Team (CTST) met in person on Friday, 2/12, at Portland Community College. All team members were present, and John Helmer represented the Alliance (i.e., Nancy Nathanson, Staff Liaison and Gregg Sapp, Council Liaison). The meeting proceeded as hoped as the group used its time productively and moved through an agenda set up to provide context for this iteration of collaborative technical services work, to review and discuss the multi-part charge and to plan for needed next steps.

With respect to its charge, CTST views the development of best practices for technical services in the context of a shared ILS as the most challenging aspect the work ahead. Even though Scenario 3 of the Shared ILS report will provide an excellent starting point, a future where the ILS could exist in the cloud (e.g., OCLC web-scale) or as a standalone system (proprietary or open-source) adds complexity to the endeavor. As noted in the minutes from the meeting, the group will explore various aspects of these possibilities under the leadership of Mark Dahl (LCC):

- Mark Dahl will write up a brief whitepaper as a starting point for further brainstorming.
- Brainstorming sessions will be open to anything and everything: what is possible and what is not possible. We will keep the best of what is possible.
- Mark will begin his whitepaper in the context of the Alliance deciding on a shared ILS: which components, what might it look like? If the Shared ILS Team goes in the direction of a Web scaled solution, we will adapt our beginning assumptions to fit that model.
- The second step is to identify what practices would have to be aligned across the Alliance.
- We're probably going to have to define what we mean by ILS and precisely which modules touch on Technical Services work (interestingly, we discovered that we define technical services a little differently at each member library).
- We need to keep the Shared ILS Team on our radar, be prepared to work with them. We may need to schedule a joint meeting.

In formulating an organizational approach to fulfilling the charge, Jeff Ring, PCC, introduced the group to a model of participation called, Community of Practice. The group self-selected into leaders, members, and peripherally interested folks and divided up responsibility according to the various roles in the model:

- Leaders: willing to work on a topic outside of these meetings; have some expertise in the area; willing to educate other members of the team about the topic.
- Members: willing to participate in meetings; offer feedback; probably not able to devote much time beyond meetings to the topic.
- Peripheral: supportive of the work, but probably only to the extent that they would like to be briefed

Leaders for each piece of the charge include: Best Practices/Shared ILS Mark Dahl (LCC); E-Book Cataloging: Mark Copsey (W2 Univ.); Non-English Cataloging : Jeff Ring (PCC) and Cataloging pre-1976 Government Documents Julie Christerson (Pacific U). Everyone else will participate as members on each of the groups save for several instances where peripheral involvement is preferred. CTST will also need the assistance of several constituent groups: heads of cataloging and government document librarians at Alliance libraries. Each of these groups need to be queried in order to assist CTST with determining how best to approach the areas where pilot projects are desired (i.e., government documents and non-English cataloging).

CTST will make use of virtual meeting software provided by LCC for future meetings. It may be necessary to schedule at least one more in-person meeting either for CTST itself or for CTST with the Shared ILS TF. The Team will keep Alliance staff apprised of its needs. CTST wants to thank the Executive Committee for the excellent job it did in selecting members for the Team. The group was delighted discover the broad base of expertise represented by members of the group. We are truly looking forward to our CTST collaboration!