Report of the GPO Project Group
June 29, 2018

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The Charge

The GPO Project Group (GPOPG) is charged with developing recommendations on establishing central management of GPO metadata for the Alliance, and on the preferred source(s) for that metadata. Recommendations will be informed by member feedback via the Technical Services Institutional Representatives. The GPOPG will produce a final report documenting their recommendations and rationale.

Action

Deliver recommendations and rationale to SC/TS chair, Linda Crook, and Program Manager, Jesse Holden.

Recommendation:

The GPO Project Group recommends that the Alliance should pursue a central loading plan for GPO metadata through Marcive's Enhanced Database plus Documents Without Shelves (ED+DWS) service.

Rationale: Central management of GPO metadata for the Alliance

While survey feedback regarding interest in a shared record loading project was largely ambivalent, we feel that this is due to the significant number of unknown details about how a central loading plan would impact members' local workflows and how much such a plan would cost. Without this information, members are hesitant to support or reject a plan outright.

By pursuing a central loading plan for GPO metadata with Marcive, we will be able to answer these lingering questions and unknowns before presenting the plan to members for adoption/rejection.

Rationale: Metadata source for GPO records

This recommendation is based on our belief that the ED+DWS service from Marcive is the most effective metadata source for reducing the work done at member institutions to manage both physical and electronic resources from the GPO. With this service in place, the remaining GPO management work needed at the local level could be standardized and documented centrally for greater continuity and consistency.

Additionally, we reached out to staff at other consortia (Marcus Jun from the Cal State System and Michael Cohen from the University of Wisconsin System) to find out more about their use of Marcive, and their feedback indicated satisfaction with both the quality of Marcive metadata and the service's flexibility in member opt-in/opt-out for both tangible and electronic resources.

Next Steps

The NZ Manager should document technical and cost information for the plan this Fall. During this process, a test load of records should be added to the NZ to fully assess both technical and workflow issues. Workflow details, technical issues, and pricing will then be provided to members (particularly to member staff responsible for GPO management), who would review the plan details, provide feedback, and then vote on final adoption.

Additional notes:

We considered several other sources of GPO metadata, including OCLC's GPO collection service, Marcive's CRDP program, and several free-of-charge record sources. In most cases, the use of these services would require the Network Zone Manager to construct the Alliance's GPO collection via advanced search, which is not guaranteed to gather all of the GPO records desired. In addition, many of the free-of-charge record sources have download limits that would make a large load unsustainably time-consuming. Finally, membership in the CRDP program would require the Alliance to become a FDLP participant, and this could prove to be problematic.

We have several concerns about the technical details of loading GPO records centrally, that we hope are resolved (or just better understood) as a result of the recommended testing in the fall. These include:
- Costs - Marcive may be cost-prohibitive. Marcive's initial talking points say that current subscribers will see a cost decrease, but members that are not currently paying for GPO resources will have to begin paying if they choose to participate.
- Costs - If we go electronic only, depository libraries would have to pay for tangible resource records on top of shared DWS cost, potentially increasing their outlay for GPO.
- Costs - Will the Alliance centrally fund the service, or will it be passed along to members directly like a subscription?
  - Put off to 2020 FY? This might make budgeting at the Alliance level possible.
- Contract terms - Different institutions have different renewal dates - need to pro-rate those contracts for partial term before central contract takes effect.
- Primo impact: Size of DWS loads ~1,000 records per month based on UID data. Concerns about electronic "swamping" have not materialized at Cal State according to Marcus Jun.
- Workflow impact - Would the tangible load include retrospective / existing records?
  - Marcive offers a separate product (additional purchase) - retrospective loads.
  - Backlogs - pre '76 docs - are not provided by Marcive.
- Workflow impact - For institutions with stand-alone or local collection records for GPO e-resources, these will be duplicates with the central electronic package. Would institutions have to review and resolve them?
  - If DWS is only "new" records, this may not be a problem.
  - Will DWS include retrospective records, or will it be new only?
- Workflow impact - It may be better to have duplicates rather than spend a lot of time cleaning them up. Primo will de-duplicate the records and show multiple access links to the user.
- Workflow impact - Is it okay for institutions to have a local portfolio attached to the NZ electronic collection bib?
- Assessment - GPO electronic resource statistics for library collections reports and other statistical surveys will likely need to be set up in NZ Analytics, then shared with members (email, webpages, etc.). Usage statistics would also be a useful addition to the service, since it makes the program more attractive to members.