

# CollaboraTeS Toolbox

## Collaborative Technical Services

### Suggestions for Implementing a Cooperative Project

#### Preplanning:

##### Institution Needing Service

- Decide on a project
- Make sure administration supports the collaboration.
- Check to see if there are any administrative personnel issues. (unions etc.)
- Evaluate library infrastructure and make sure it will support the project. (Shared catalog, similar local practices, standardized cataloging rules etc.)
- Evaluate if it's more economical to do this project commercially or with collaborator
- Locate library willing to share expertise
- Arrange meeting with potential partner to discuss, build trust and get buy-in

##### Institution Providing Service

- Make sure administration supports the collaboration.
- Decision making: Do you have the extra capacity? Library offering service must decide if they have the time/resources to agree.
- Evaluate library infrastructure and make sure it will support the project. (Shared catalog, similar local practices, standardized cataloging rules etc.)
- Decide if there are any administrative personnel issues (unions etc.)

#### Getting Ready

- Assign project leaders on both sides of the project. Have a clear understanding of the agreement on what work is to be done.
- Establish trust by having participants meet in person to plan and kick it off. Get buy in from staff participating at both ends

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- Discuss specifications and workflow anticipated. Is it a short term project or ongoing?
- Agree in advance on the cost, barter arrangement or compensation to the library either monetarily or gift in kind.
- Do a test run/trial and evaluate to be sure specifications meet understanding.
- Agree on a timeline for the project.
- Put agreement in writing for future reference (MOU).

### Implementation

- Schedule meetings/phone calls on a regular basis to discuss status, progress and problems.
- Decide in advance how periodic quality control will be evaluated
- Service receiver should be flexible if they are not paying for a service and unforeseeable delays happen by the service providers
- If the agreed upon deadline is not possible, or the project is larger than expected, discuss and revise the timeline.
- Be flexible. Don't be afraid to adjust the workflow if staff finds a better way during the project.
- Communicate. Communicate. Communicate.

### Evaluation

- Evaluate project. When project is completed or at periodic points in the project, have a post mortem discussion to alter or improve process along the way.

### Conclusion

- Celebrate the conclusion of the project!



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