

Using the Tools in the CollaboraTeS Toolbox to Get Work Done

Margaret Maurer
Head, Metadata and Catalog
Kent State University Libraries

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 1

CollaboraTeS Database of Expertise

- Library contact information
- Libraries that have / need expertise
 - Subjects
 - Technical skills
 - OCLC products and services
 - Foreign languages
 - Specific formats and schemas
 - PCC participation

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 2

Survey Results (in brief)

- Capacity existed to collaborate
- Libraries large and small were willing to collaborate
- Libraries identified more expertise than needs

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 3

Context and Research

- zCUL – Columbia and Cornell University Libraries
- Next Generation Technical Services – University of California Libraries
- Orbis Cascade Alliance
- Denison University and Kenyon College
- MaRLI – New York Public Library, Columbia University Libraries, New York University Libraries
- North American Collaborative Projects:
<http://platinum.ohiolink.edu/dms/collaborate/Collaborative%20Projects%20of%20DMS.xls>

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 4

The Context for Collaboration

- Management practices, work cultures and consortial environments all impact collaboration
- Workflow re-design disrupts current processes
- Existing processes have stakeholders
- “Sharing can be difficult and uncomfortable because it involves a loss of control and a dilution of one’s institutional identity”
- “Sharing well is hard work”

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 5

Successful Collaborations Feature:

Strong support – Pressing economic reasons to collaborate – Geographically proximate (or have good delivery systems) – Experienced at creating workflow agreements and MOUs – Exhibit similar work cultures – Experienced at cooperating with each other – Often hire a consultant – Good project planning and management practices – Find grant money – Manage communications well – Manage staff buy-in well – Have a shared backend on their automation system – They plan a manageable project – Territoriality is neutralized –

They trust each other.

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 6

Project Planning

- Good planning enables the library to avoid problems
- First-time collaborators should start simply and small
- Gain administrative support
- Determine you have the staff to coordinate and accomplish the project

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 7

Locating a Partner

- Use existing directories
- Current partners
- PCC libraries
- Proximate libraries

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 8

Project Implementation

- Define specifications and workflow
- Cataloging workflow challenges
 - Physical or electronic manifestation to be cataloged
 - Cataloging from surrogates
 - Bibliographic record transmission

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 9

Collaborative Project Management

- Project coordinators are needed at both libraries
- Staff participation and buy-in are crucial
- Beta tests or trial runs followed by evaluations will foster success
- Have defined timelines.

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 10

Methods of Compensation

- Do the work at no charge (especially for ad-hoc occurrences)
- Alternative compensation (credits, deliverables from other partners)
- Barter system
- Non-cash tokens
- \$\$\$\$ (cost recovery or profit)

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 11

Costing Elements

- ALCTS Heads of Technical Services in Large Research Libraries Interest Group Task Force on Cost/Value Assessment of Bibliographic Control:
 - Staff salaries
 - Benefits
 - Time spent for all bibliographic control activities
 - Cataloging tools
 - Database maintenance costs
 - and Overhead

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 12

Basic Calculations

Unit Cost =
cost of producing N units of work
divided by N

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 13

Staff Costs

- Time studies
- Unit tasks
- Cost of benefits

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 14

Other Costs

- Supplies
- Indirect or overhead costs
- Estimating costs

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 15

Writing a Memorandum of Understanding (MOU)

- Having it in writing matters
- The complexity of the MOU is defined by the nature of the project and the relationship between the two institutions.
- Focus should be on the service
- Include:
 - State what is needed
 - Define the mechanics and process of fulfilling those needs
 - Describe the quantities of work
 - Define the ways of measuring them
 - Define deadlines and duration

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 16

Evaluation and Assessment

- Regularly scheduled communications
- Flexibility regarding benchmarks and timetables
- Periodic evaluation and assessment

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 17

Closure and Next Steps

- Collaboration has a bright future
- Creating an inventory of technical services expertise fosters collaboration
- Technical services best practices can be applied to the collaborative arena
- Costing models, financial management skills and skills creating MOUs foster collaboration

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 18

Questions?

Margaret Maurer
mbmaurer@kent.edu
330.672.1702

OVGTSL 2013 Margaret Maurer, mbmaurer@kent.edu 19