Using the Tools in the CollaboraTeS Toolbox to Get Work Done Presentation Slides

Margaret Beecher Maurer, Kent State University - Kent Campus
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Margaret Maurer
Head, Metadata and Catalog
Kent State University Libraries

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

Survey Results (in brief)
- Capacity existed to collaborate
- Libraries large and small were willing to collaborate
- Libraries identified more expertise than needs

Context and Research
- 2CUL – Columbia and Cornell University Libraries
- Next Generation Technical Services – University of California Libraries
- Orbis Cascade Alliance
- Denison University and Kenyon College

- North American Collaborative Projects:
  [http://platinum.ohiolink.edu/dms/collaborate/Collaborative%20Projects%20for%20DMS.xls](http://platinum.ohiolink.edu/dms/collaborate/Collaborative%20Projects%20for%20DMS.xls)

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”

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.
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

Locating a Partner
• Use existing directories
• Current partners
• PCC libraries
• Proximate libraries

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

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.

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)

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
Basic Calculations

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

Other Costs
- Supplies
- Indirect or overhead costs
- Estimating costs

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

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

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
Questions?

Margaret Maurer
mbmaurer@kent.edu
330.672.1702