SLSP Working Groups

Overview

There will be six Working Groups comprising PASCAL member library professional and paraprofessional staff. The Working Groups are currently defined by the following areas of expertise:

1. Access services and resource sharing
2. Cataloging and metadata
3. Collection management and acquisitions
4. Discovery, reference, and end-user experience
5. Electronic resources, knowledgebase management, and link resolving
6. Systems

Structure and Roles

Members of the Working Groups develop the policies, procedures, and workflows related to administering and managing the SLSP. The documentation they create is communicated to the Library Representatives for feedback and local decisions. Each of the 6 Working Groups have different functions, responsibilities, and expectations. However, the structure and roles are the same across all 6 Groups.

- Each Working Group will be comprised of 7 to 9 individuals representing the diversity of the PASCAL member institutions. This number may be modified depending on the phase of implementation and activity required. The number may also vary between Working Groups based on need.
- A PASCAL staff member will serve *ex officio* on each Working Group.
- The chair of each Working Group will serve on the SLSP Implementation and Management Team.
- The chair-elect of each Working Group will coordinate communications and training.
- Working Group members use their background and experience to inform the group’s recommendations about the shared library services platform for the benefit of all PASCAL members.
- The work of Group members should be adjusted by their institutions so that consortial work is not seen as “extra,” volunteer,” or “as time allows.” The work should, instead, be considered an important formal assignment.

Participation

- PASCAL member library staff can nominate themselves or a colleague for Working Group
Shared LSP Collaborative Management

- Each member should be currently involved in work that falls within the Working Group’s area of expertise; however, library deans/directors may serve on a Working Group, as appropriate.
- Based on the nominations, the SLSP Steering Committee and the SLSP Coordinator will collaborate to make final membership decisions. The respective library dean/director will be consulted prior to the proposed member being invited to serve on a Working Group.
- Each member and their library dean/director or appropriate University administrator will be asked to review the responsibilities and expectations for the Working Groups outlined in this document and confirm their commitment to serve via email.
- Members will serve a rolling two years. In the first year of the Working Group (2017-2018) half the members of the team will only serve 1 year.

Expectations and Responsibilities

**Members** of each Working Group are expected to work collaboratively to do the following for their area(s) of expertise:
- Collaborate with relevant Working Groups to develop and document specifications, policies, procedures, workflows, and other relevant documentation.
- Document the Working Group’s recommendations, all communications with Library Representatives and other stakeholders, and final decisions.
- Communicate final decisions to the Library Representatives and the SLSP Implementation & Management Team.
- Contribute to online training manuals.
- Identify and develop necessary SLSP system reports. Reports include those that affect daily operations, as well as library fiscal reporting obligations.
- Identify current best practices and conduct ongoing research of pending changes affecting their area.
- Collaborate with relevant Working Groups to conduct assessments and tests of functionality in new system releases.

**Chairs** of each Working Group are expected to do the following for their area(s) of expertise:
- Serve as a member of the SLSP Implementation & Management Team. (See document for the Implementation & Management Team for specific expectations and responsibilities).
- Create and disseminate a regular meeting schedule (meet at least twice monthly, either virtually or face-to-face). Ensure that minutes of the meetings are posted to the PASCAL website and distributed via appropriate communication channels.

**Chair-elects** of each Working Group are expected to coordinate communication and training for their area(s) of expertise. Responsibilities for their Working Group include:
● Collaborate with PASCAL staff in the development and delivery of training.
● Coordinate with Implementation & Management Team on the scheduling of training.
● Coordinate the development and maintenance of training manuals, using vendor documentation, as well as standards and templates from the Implementation & Management Team as appropriate. These manuals will be updated on a regular, pre-defined schedule.
● Communicate draft versions of documentation via established communication channels to Library Representatives for feedback and local decisions.
● Communicate feedback and decisions from Library Representatives to all Working Group members.
● Post final versions of documentation to the PASCAL website and distribute via established communication channels to all stakeholders.

If a member of a Working Group is also a Library Representative, they will need to understand that as a Working Group member, they will be representing the SLSP first and their institution second. However, when they are doing the work of the Representative, they are doing so with their institution’s best interests in mind.

Communication Methods

Communication is vital to the success of the Working Groups, and the expectations for communication are outlined below:

● Participate in relevant communication activities such as email, listservs, webinars, file sharing, surveys, and workshops related to the SLSP.
● Provide updates as appropriate at PASCAL meetings.
● Communicate draft versions of documentation (e.g., policies, workflows, manuals) via established communication channels to Library Representatives for feedback and decision-making.
● Post meeting minutes and final versions of documentation (e.g. policies, workflows, manuals) to the PASCAL website and distribute via established communications channels to all stakeholders.

Decision Making

The Working Groups are responsible for developing and documenting specifications, policies, procedures, workflows, and other documentation. However, the decision-making related to this documentation falls to the Library Representatives who will coordinate with local area experts and stakeholders to understand the impacts and implications for matters requiring local decisions.

To facilitate the decision-making process at the local level, the chair-elect of the Working Group will coordinate communication between the Library Representatives and the Working Group itself using
established communication methods. The chair-elect will share draft versions of policies, procedures, workflows, and other documentation requiring local feedback and decisions. The chair-elect will then communicate feedback and local decisions from Library Representatives to all Working Group members. Based on this feedback, the Working Group may choose to revise the documentation and send out a new draft for additional feedback/decision-making.

In the cases where a decision is required by the member libraries, the chair-elect will consolidate feedback and decisions from all the responding Library Representatives and communicate them to the Working Group.

If there is no feedback indicating the documentation would be a “deal-breaker” for one or more institutions, the Working Group will finalize the documentation and post it to the PASCAL website and distribute it via established communication channels to all stakeholders.

If the documentation would be a “deal-breaker” for one or more institutions, the Working Group will revise the documentation based on member feedback and share the new draft with Library Representatives for additional feedback.

If the PASCAL member libraries cannot agree on whether to support the documentation, and subsequent revisions do not adequately address the concerns voiced by PASCAL member libraries, the Working Group may work with the Implementation & Management Team and/or the Steering Committee to resolve the conflict.

Training

Working Group members will be required to attend the following training, as appropriate:

- SLSP system training as scheduled by the Implementation & Management Team.
- In-person and/or online training with either the Working Group’s chair-elect or the PASCAL staff. Working Group training will convey responsibilities, expectations, workflows, and decision-making parameters. The Working Group members will also be set up and trained on any relevant communication methods such as listservs, conferencing software, etc.
- In-person and/or online training and support to existing Working Group members as required.

Working Group Descriptions

The specific working groups needed to manage a shared LSP may vary depending on the specific system chosen. It is the responsibility of the Steering Committee to adjust the nature of these Working Groups as necessary. However, to expedite planning and at least the initial phase of implementation, the following groups are recommended:
1. Access services and resource sharing

**Function**
Ensures that fulfillment processing is streamlined and stable for the betterment of user and staff experiences.

**Expectations and Responsibilities**
This Working Group is responsible for the development of all circulation and resource sharing functionality (*e.g.* interlibrary loan and document delivery) including: patron data, check out procedures, fines and notices, and data conversion, with particular emphasis to policies that promote cross-institutional availability.

2. Cataloging and metadata

**Function**
Explores, maximizes the use of, and advocates for improvements of the SLSP to develop efficiencies in shared cataloging and metadata activities.

**Expectations and Responsibilities**
This Working Group is responsible for the development of guidelines and workflows regarding standard cataloging and metadata activities, as well as facilitating discussions regarding local customization needs. Specific topics include, but are not limited to: guidelines for item and bibliographic description, holdings data, data conversion, authority control, and data clean-up.

3. Collection management and acquisitions

**Function**
Ensures that the print and electronic collection management and acquisitions processes are streamlined and stable, and that fiscal reports meet the needs of each library.

**Expectations and Responsibilities**
This Working Group is responsible for the development of acquisitions functionality, conversion of acquisitions data (current and historical) into the new system, serials check in, and pattern implementation.
4. Discovery, reference, and end-user experience

**Function**
Ensures that all patrons are able to discover all items locally as well as consortially in a stable and streamlined fashion.

**Expectations and Responsibilities**
This Working Group is responsible for:

**Discovery Configuration**: Research, implement, recommend, and document discovery configuration, including: back-end configuration related to bibliographic records, normalization rules, data mapping for MARC and non-MARC data, indexing rules, and OAI-PMH harvesting. Develop support functions for the SLSP’s interoperability with third party discovery systems, if applicable.

**Discovery Interface**: Develop and conduct usability, and accessibility testing of the new discovery tool's public interface, including the look and feel of the union catalog. Make recommendations on how each institution configures its local interface.

5. Electronic resources, knowledgebase management, and link resolving

**Function**
Ensures efficiencies related to electronic resource management (ERM) functionality to improve workflows and communication of license terms.

**Expectations and Responsibilities**
This Working Group is responsible for the development of guidelines for electronic resource description, activation, and required/optional display of license terms. They also develop support functions for the interoperability of the SLSP with third party link resolver systems, if applicable.

6. Systems

**Function**
Investigates new solutions, oversees implementation, and continually assesses existing systems against emerging needs and technological changes to ensure agility and achieve improved functionality, efficiency, and interoperability.

**Expectations and Responsibilities**
This Working Group monitors vendor compliance with Service Level Agreements and general performance of customer support. Other responsibilities include:

- Defining and implementing system access and permissions, printing requirements, batch loading rules/schedules, and data conversion requirements.
- Ensuring interoperability with enterprise and authentication systems, such as Banner, PeopleSoft, EZProxy, etc.
- Providing recommendations to the SLSP Coordinator regarding the creation and ongoing maintenance of the SLSP Help Desk.
- Coordinating release testing and training with all other Working Groups.
- Developing requisite reports for daily workflow and fiscal reporting needs.
- During implementation, identifying system-level enhancements or customizations and communicating them to the SLSP Help Desk and/or vendor as appropriate.

Disclaimer

This document is subject to review and change. Revisions of the document will be distributed to PASCAL member libraries through established communication channels.