**WORKSTREAM TRANSITION PLANNING: LIBRARY V1**

**Workstream leads: Paul Ayris and Andrew McDonald**

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| **Preamble** |
| * This document indicates the initial scope of each group (process or sub-stream). * We expect the groups to refer some issues to other groups, along the lines indicated below. * We expect the groups to flesh out the scope of their work and advice on further key dependencies both within and beyond the libraries. * We expect groups to identify solutions where possible. * We encourage groups to suggest further significant issues for consideration to PA/AM. * Throughout the year groups will have the benefit of the experience of merged operations to inform their thinking. * The groups should always bear in mind both the needs of our users and operational efficiency. * The groups should acknowledge best practice in both libraries. * Where there is a dependency on the work of Other Groups, the Group named in the Process columns ‘owns’ the action to report on all relevant issues, and should consult with the Groups listed in the Key Dependencies column to ensure all points are covered * A great deal of progress has already been made by the Day 1 Group in moving forward with access, borrowing, e access and communication issues. * It is our anticipation that groups will report on progress throughout the year on a monthly basis and will produce a report at the end of the year indicating any further areas of work. |

| **PROCESS**  **User/Reader Group** | **WORK REQUIRED**  Rules and Regulations  Membership policy and charges  Access arrangements  Borrowing  Fines and charges  Access to e resources  Opening hours  Interlibrary loans  Photocopying /printing / scanning  Enquiries  Guiding  External Readers  Publicity, branding and communications  Self service  Complaints and feedback  Walk in access  Satisfaction, quality and audits  Stores  Assistive Technology  Induction for staff, students and external readers etc. | **PERSON(S) RESPONSIBLE**  Ben Meunier  Peter Dennison  Mat Reynolds  Breege Whiten  + Debs Furness/Lesley Bugden (as and when)  Rozz Evans  Frances Shipsey  Freddie Linares | **TIMESCALE**  Complete by end of Year 1 with report including plans for any future work | **KEY DEPENDENCIES**  Access control should also be covered by IT/ Technical Services Sub-Group. Also Estates.  Access to e-resources should also be covered by Academic Support Group. Also IT Services  Publicity etc. should also be covered by Strategy/ Planning, and Academic Support Groups  Self-service should include discussion with IT/Technical Services | **PROGRESS**  Day 1 Group has already made progress on some of these issues |
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| **PROCESS**  **Technical/IT Services Group** | **WORK REQUIRED**  Library Management System  Discovery System  Desk top issues  E resources and e access  Web site  Repository system  Archives system  VLE  Digitisation  Access control  RFID  Mobiles and tablet  Book detection  Self services  Digital curation  Theses and E-Theses | **PERSON(S) RESPONSIBLE**  Martin Moyle  Bernard Scaife  Margaret Stone  Karen Jeger  Frances Shipsey  Peter Dennison    + Ben Meunier /nominee as and when  + senior users of relevant systems, as and when | **TIMESCALE**  Complete by end of Year 1 with report including plans for any future work | **KEY DEPENDENCIES**  IT and Media Services in UCL and IOE.  UCL Procurement  Needs to include UCL Information Services and IoE IT Services  Estates | **PROGRESS** |
| **PROCESS**  **Academic Support Group** | **WORK REQUIRED**  Academic liaison  Information skills training  Collection Management and Development  E-resource content (e books, e journals and databases) - overlap and licences  Periodicals (overlap)  Stores  Digitisation for VLE  Guides | **PERSON(S) RESPONSIBLE**  Martin Moyle  Rozz Evans  Betsy Anagnostelis  June Hedges  Hazel Ingrey  Rebecca Webster  Frances Shipsey  Nazlin Bhimani  Barbara Sakarya  Emma Allison  Andrew Welshman | **TIMESCALE**  Complete by end of Year 1 with report including plans for any future work | **KEY DEPENDENCIES**  Licensing of e-resources being considered by separate working group  Ditto  Need to include Reader Services for UCL’s Stores Service  Reader Services in UCL would need to be included in discussions over Guides | **PROGRESS** |
| **PROCESS**  **Archives, Special Collections and Records Group** | **WORK REQUIRED**  Archives  Special Collections  Records and records management  Depositors, donors and ownership  Funders  Accreditation  Digital archives  Digital archive curation  CALM/Axiell  Access and Reading Room  Widening Participation  Preservation and conservation  Archive Stores  Archives cataloguing  Collection development  Collections on permanent loan | **PERSON(S) RESPONSIBLE**  Martin Moyle  Rozz Evans  Sarah Aitchison  Gill Furlong  Colin Penman  Matt Mahon  Katie Meheux  + Paul Ayris (any buildings matters)  Nazlin Bhimani  Rebecca Webster | **TIMESCALE**  Complete by end of Year 1 with report including plans for any future work | **KEY DEPENDENCIES**  Include UCL Planning & Resources in discussion over funding  Include IT Services in UCL in discussions on all digital arrangements  Include UCL Preservation Librarian in discussions  Include Buildings Officer in UCL in discussions  Include Bibliographic Services in cataloguing discussions | **PROGRESS** |
| **PROCESS** | **WORK REQUIRED** | **PERSON(S) RESPONSIBLE** | **TIMESCALE** | **KEY DEPENDENCIES** | **PROGRESS** |
| **Bibliographic Services Group** | E resources (books, periodicals and databases)  E resources overlap and licences  Acquisitions  Cataloguing  Indexing  Periodicals (overlap)  Suppliers and purchasing consortia  Preservation and conservation | Bernard Scaife  Martin Moyle  Richard Jalowik  Karen Jeger  Bill Martin  Tom Meehan  Anna Sansome  Rozz Evans  Frances Shipsey  Bryan Johnson | Complete by end of Year 1 with report including plans for any future work |  |  |
| **PROCESS**  **Strategy and Planning Group** | **WORK REQUIRED**  Strategies  Policies  Governance and committee structures  Planning rounds and audits  Membership and subscriptions to professional bodies  Representation on professional and other bodies  Licences and renewals  Digital compliance  Rules and Regulations  Financial planning and bids  Resource allocation  Budgetary alignment, balance and control  Staff and non staff costs  External funding  Insurance  IPR on created systems, applications, databases and metadata  Contract novation  Disaster plan | **PERSON(S) RESPONSIBLE**  Paul Ayris  Andrew McDonald  Ben Meunier  Martin Moyle  Nova Larch  Kate Cheney  June Hedges  Rozz Evans  Sarah Aitchison  Peter Dennison  Bernard Scaife  Frances Shipsey  Emma Allison | **TIMESCALE**  Complete by end of Year 1 with report including plans for any future work | **KEY DEPENDENCIES**  Other groups will cover policy issues of importance to their activities. This sub-stream will consider policies not covered elsewhere  Reader Services oversees Rules and Regulations in UCL | **PROGRESS** |
|  | Staff recruitment and selection  Staff structure and organisation  Line management  Communication, meetings and staff days  Staff training and development  Staff procedures for promotion, appraisal, health and safety, performance and sickness |  |  |  |  |

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| **PROCESS**  **Space Management/ Health & Safety Group** | **WORK REQUIRED**  Branding  Access and access control  Opening hours  Publicity  Guiding  Space plans and pressures  Environmental control; Health & Safety  Security and book detection systems  Stores  Shelving, reader places, furniture, equipment, counters, staff room and meeting rooms | **PERSON(S) RESPONSIBLE**  Ben Meunier  Jay Woodhouse  Peter Dennison  Scott Foulon  Nova Larch  + Mat Reynolds (as and when)  Rozz Evans  Sarah Aitchison  Jessica Womack | **TIMESCALE**  Complete by end of Year 1 with report including plans for any future work | **KEY DEPENDENCIES**  Dealt with by Reader Services/IT Services in UCL. Also Estates.  Include Reader Services in UCL  Dealt with also by Estates in UCL  Dealt with by Reader Services in UCL  Dealt with by Reader Services in UCL; and Archives and Collections in IoE | **PROGRESS** |

| **PROCESS** | **WORK REQUIRED** | **PERSON(S) RESPONSIBLE** | **TIMESCALE** | **KEY DEPENDENCIES.** | **PROGRESS** |
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| **Research Support Group** | Open Access  Research Data Management  N.B. Press activity is being covered by a separate Workstream | Paul Ayris  Andrew McDonald  Martin Moyle  June Hedges  Catherine Sharp  Erica McLaren  Bernard Scaife  Sarah Aitchison  Bryan Johnson | Complete by end of Year 1 with report including plans for any future work | Refer to JOPG and MOG as responsibilities for and organisation of these functions are different in UCL and IOE |  |

*Paul Ayris*

*Andrew McDonald*

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