**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.
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| **PROCESS****User/Reader Group**  | **WORK REQUIRED**Rules and RegulationsMembership policy and chargesAccess arrangementsBorrowing Fines and charges Access to e resources Opening hours Interlibrary loansPhotocopying /printing / scanningEnquiriesGuiding External ReadersPublicity, branding and communications Self serviceComplaints and feedbackWalk in accessSatisfaction, quality and auditsStoresAssistive Technology Induction for staff, students and external readers etc. | **PERSON(S) RESPONSIBLE**Ben MeunierPeter DennisonMat ReynoldsBreege Whiten+ Debs Furness/Lesley Bugden (as and when)Rozz EvansFrances ShipseyFreddie 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 GroupsSelf-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 issuesE resources and e accessWeb siteRepository systemArchives system VLEDigitisationAccess controlRFIDMobiles and tabletBook detectionSelf servicesDigital curationTheses and E-Theses | **PERSON(S) RESPONSIBLE**Martin MoyleBernard ScaifeMargaret StoneKaren JegerFrances ShipseyPeter 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 ServicesEstates | **PROGRESS**  |
| **PROCESS****Academic Support Group** | **WORK REQUIRED**Academic liaisonInformation skills training Collection Management and Development E-resource content (e books, e journals and databases) - overlap and licences Periodicals (overlap)StoresDigitisation for VLEGuides  | **PERSON(S) RESPONSIBLE**Martin MoyleRozz EvansBetsy AnagnostelisJune HedgesHazel IngreyRebecca WebsterFrances 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 groupDittoNeed to include Reader Services for UCL’s Stores ServiceReader Services in UCL would need to be included in discussions over Guides | **PROGRESS** |
| **PROCESS****Archives, Special Collections and Records Group**  | **WORK REQUIRED**Archives Special CollectionsRecords and records managementDepositors, donors and ownershipFundersAccreditation Digital archives Digital archive curationCALM/AxiellAccess and Reading Room Widening Participation Preservation and conservationArchive Stores Archives cataloguingCollection developmentCollections on permanent loan | **PERSON(S) RESPONSIBLE**Martin Moyle Rozz Evans Sarah AitchisonGill FurlongColin PenmanMatt MahonKatie 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 fundingInclude IT Services in UCL in discussions on all digital arrangementsInclude UCL Preservation Librarian in discussionsInclude Buildings Officer in UCL in discussionsInclude 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 licencesAcquisitionsCataloguingIndexingPeriodicals (overlap)Suppliers and purchasing consortia Preservation and conservation  | Bernard Scaife Martin MoyleRichard JalowikKaren JegerBill MartinTom MeehanAnna SansomeRozz 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**StrategiesPoliciesGovernance and committee structures Planning rounds and auditsMembership and subscriptions to professional bodies Representation on professional and other bodiesLicences and renewals Digital compliance Rules and Regulations Financial planning and bidsResource allocation Budgetary alignment, balance and controlStaff and non staff costsExternal fundingInsuranceIPR on created systems, applications, databases and metadata Contract novationDisaster plan | **PERSON(S) RESPONSIBLE**Paul Ayris Andrew McDonaldBen MeunierMartin MoyleNova LarchKate Cheney June HedgesRozz 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 elsewhereReader Services oversees Rules and Regulations in UCL | **PROGRESS** |
|  | Staff recruitment and selectionStaff structure and organisation Line management Communication, meetings and staff daysStaff training and developmentStaff procedures for promotion, appraisal, health and safety, performance and sickness |  |  |  |  |

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| **PROCESS****Space Management/ Health & Safety Group** | **WORK REQUIRED**BrandingAccess and access controlOpening hoursPublicityGuidingSpace plans and pressuresEnvironmental control; Health & Safety Security and book detection systems StoresShelving, reader places, furniture, equipment, counters, staff room and meeting rooms | **PERSON(S) RESPONSIBLE**Ben Meunier Jay Woodhouse Peter DennisonScott FoulonNova 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 UCLDealt with also by Estates in UCLDealt with by Reader Services in UCLDealt 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 AccessResearch Data ManagementN.B. Press activity is being covered by a separate Workstream  | Paul Ayris Andrew McDonald Martin MoyleJune HedgesCatherine SharpErica McLarenBernard 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*

*December 2014*