2020-08-27 Resource Management Meeting Notes

Date
27 Aug 2020

Attendees
- Kristin Martin
- Abigail Wickes
- Laura Wright
- Mark Arnold
- Nancy Pells
- Paul Trumble
- Norma Flores
- Julie Brannon
- Sarah Dennis
- Martina Schildt
- Anne Campbell
- Virginia Martin
- Lloyd Chittenden
- Tracy L Patton
- Sara Colglazier
- Molly Driscoll
- Ann Crowley
- Tim Whisnant
- Owen Stephens
- Heather Thoele
- Kathleen Norton
- Charlotte Whitt
- Dennis Bridges
- Jesse Lamberton

Goals

Discussion items

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<td>Minute taker?</td>
<td>Abigail Wickes</td>
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| Announcements/updates             | Kristin Martin | - Planned revised release schedule for FOLIO from Capacity Planning Team  
- Recommendation to shift to 3 releases/year (~March/July/November) now that product has been implemented many places; implication moving Honeysuckle release to late Nov.  
- Positive feedback from Duke, hopefully more time to work on features rather than releases  
- FOLIO vision/strategy work is underway  
- Subset of Product Council + a few others; first meeting this week  
- Expense classes User Acceptance Testing  
- The feedback form is open through Tuesday—**feel free to test if today’s meeting runs shorter!** |

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Statistics Working Group

Laura Wright

• Forming (probably short-lived) working group to work on tracking productivity statistics
  • Many of institutions already track this using MARC (Cornell uses 948 field), but also considering Acquisitions Functions, (e.g. checking added volumes/withdrawals…) what kind of cataloging was done by individuals or in batch; goal to track this in FOLIO w/out using MARC, so RM perspective would be very helpful
  • Productivity stats useful for tracking who did what (intentionally) if questions come up, and reporting on technical services activities as a unit
    • Owen S.—individual stats handled differently in Europe w/r/t privacy issues, whereas overall reporting is more of a universal need
  • Investigate and develop short-term solutions with existing functionality and consider long-term potential solutions as well
    • Consider what is tracked automatically already vs. what is actually reported (e.g. one update to a record might be edited and saved a few times, but would only want to count overall activity as one update)
    • Julie B.—envisioning some of this tracking via Reporting-SIG; how would this group differ?
      • Laura W.—Reporting-SIG would put together requirements for report, Productivity Stats working group would ensure the data is there for reporting
    • Kristin M.—guessing metadata side of reporting will be more complex than RM, considering different levels of cataloging—lots of information should already be there
    • Lloyd comment—would this be a manual process where people choose to record the information or not?
      • Laura W.—group needs to decide
    • Martina S.—not allowed to track individual productivity in EU, need to be able to opt out; currently using common log-ins with colleagues as a workaround; hope to be able to disable in future
    • Kristin M.—one purpose of tracking RM work in US is for auditing
    • Owen—concerns about introducing something new that some libraries would have to work around, but understand that some libraries would want this information; solution should be optional rather than compulsory
    • Sarah C.—would be helpful to bring up with ERM working group; often important to know whether changes were done by individual or system—added to implementer Wiki page for further discussion
  • Laura W.—RM tracking sounds less complex, but will create a space in Wiki for RM use cases which will be very helpful starting point
  • Would be good for someone under EU regulations to participate, or at least be consulted

| Acquisitions updates /implementation questions? | N/A |

Action items