

Systemwide Operations and Planning Group (SOPAG)

SOPAG Action Minutes – May 22, 2003

See also <http://libraries.universityofcalifornia.edu/sopag/>

Present: T. Dearie, B. Hurley, J. Kochi (recorder), K. McGirr, P. Mirsky, M. Moody, J. Ober, T. Ryan, L. Tanji, J. Tanno (Chair), S. Wittenbach

Absent: B. Miller

1. Review Process for the CMPG White Papers:

Developing a Shared Collection for the University of California (draft report); Collection Management and Coordination: A Strategy for the UC Libraries (draft report).

1.1 Review by ACGs, Campus Discussions, SOPAG Report.

The following process will be presented to the ULs: SOPAG will prepare a set of questions to help facilitate the discussions. The ACGs, LAUC, and campuses will be given 6 weeks to review the white papers, using the SOPAG questions as a guide. The SOPAG rep. is responsible for ensuring campus discussions occur, but it is up to the individual campuses to decide how to structure the discussions. All feedback will be forwarded back to SOPAG, who will combine the feedback and present a report to the ULs.

1.2 Review Questions

Hurley has drafted a set of questions to be sent with the white papers. He has refined the initial list to incorporate SOPAG comments. SOPAG discussed other refinements and organizational changes.

ACTION: Hurley will revise the questions to reflect further suggestions.

ACTION: Tanno will ask ULs if they have any concerns with using the 3 types of shared collections as the framework for the feedback, and inquire about the status of finalizing the white papers.

2. Working Group on the UC Shared Print Collection Pilot

Report available at <http://cdc.lib.uci.edu/>

Tanji reviewed changes between the draft document SOPAG saw previously and the final draft. Questions were raised about the decision not to distribute print records to campuses for monographs and also the decision not to bind.

Suggested revisions to the report included 1) a footnote be added to the report that clarifies that the affected titles in this collection are only those Elsevier titles that UC subscribed to in print in 2002 and all ACM titles; 2) a rephrasing of the section in the conclusion that begins “Two policies established should transcend all future collections” to identify those issues that are relevant to other shared collections and will be tested in this pilot as well as those issues that might vary with other shared collections; 3) changing the name of the location code (SRLFUCL); and 4) a rephrasing on the first page to indicate that "policy recommendations" are specific to the pilot project.

SOPAG raised concerns about the scalability of the model. It was agreed that a rigorous assessment of the pilot needs to occur and should include evaluation of the economic aspects and seek feedback and comments on how pilot project has gone from library staff and users. SOPAG

further recommends that CDC be the advisory, oversight, and evaluation group for the pilot project.

ACTION: Tanji will take the revisions back to CDC.

ACTION: Tanno will charge CDC to be the advisory and oversight group for the implementation of the pilot project.

ACTION: After revision, Tanno will widely distribute the final report for informational purposes.

3. Government Information Task Force

SOPAG discussed the Government Information Task Force report. Mirsky mentioned that there are some opportunities for UC to influence some of the perceived and real barriers that impact how we manage federal and state government document collections.

ACTION: Tanno will send out the report for review by ACGs with feedback due by mid-/late July.

ACTION: In alignment with recommendation #2 of the report, Tanno will ask the Task Force to draft an implementation steering committee charge that will address scope and timeframe.

ACTION: Mirsky will ask L. Kennedy how we communicate with other California depositories regarding local documents that aren't in the University of California, e.g., Stanford or CSU campuses.

4. Task Force on Visual Resources

Report available at <http://libraries.universityofcalifornia.edu/sopag/vrtf/>

Ober has sent L. Farley the questions from the last SOPAG meeting and is awaiting a reply.

Hurley asked about the intent of CDL in regards of the CDL Image Demonstrator project. If the intent is to make it a service (instead of only an internal project), then should we investigate building a pilot project based on the recommendations of the Task Force using the Image Demonstrator.

ACTION: Ober will talk to Farley and ask the TF to respond to the SOPAG questions by revising the report. He also will ask Farley for an estimated delivery date of the revised report.

5. Systemwide Library Planning

5.1. UC Libraries Website—Update

Tanno reported that he is receiving responses from ACGs in regards to the questions he sent about ACG websites. CDL will be able to secure a domain name that ends with .edu (i.e., libraries.universityofcalifornia.edu).

6. Report on CDL-Related Items

Ober directed attention to the May CDL report from Greenstein to the other ULs. It includes an announcement about an initiative with UC-based herbaria to encourage their production of more online content, and reports developments in discussions with UMI and graduate deans about maintaining digital dissertations locally.

6.1. Melvyl Transition

CDL has received over 400 comments/feedbacks that are being answered personally by CDL staff. The questions/answers are being used to build FAQs for Melvyl-T. Training at all

campuses is almost completed. Many of the problems that turned up during stress test have been fixed. In particular, the “server busy” problems have been resolved.

Hurley reports that migration is going better than could be expected and that CDL staff should be commended for their efforts.

The music librarians have identified a problem with the way uniformed titles sort and display in Melvyl-T. A memo to SOPAG is being drafted that outlines the problem in more detail and offers possible solutions.

6.2. SFX Update

Training has been completed in the North and the South and has gone well.

6.3 CBS/Request/Desktop Delivery--Update

Request:

CDL is doing the necessary programming to remove limits on Request. The changes should be in production by July 1.

CBS/VDX

A live test between 2 campuses (UCLA and UCSB) will take place on June 10.

In regards to the issue of duplicate Requests being placed by the same patron, M. Health reports that 8% of Requests are duplicates. Reasons for duplicates (in order of frequency):

- Multiple records in Melvyl
- Multiple records in results sets
- People hitting submit button multiple times

Currently OCLC does de-dup these types of Requests, but the current version of VDX does not. It would take CDL 1 – 1 ½ months of programming effort to solve the problem. VDX is working on a solution and has said it will resolve the problem by the end of the calendar year. CDL recommends that we wait for VDX’s solution.

SOPAG acknowledges that there will be an increase on staff workload on a temporary basis until VDX de-dups like OCLC and that there will be no OCLC cost savings until everyone switches.

ACTION: SOPAG will inform the ULs of the issues surrounding VDX.

ACTION: SOPAG reps should encourage campuses to test VDX.

ACTION: SOPAG endorses CDL’s recommendation to wait for VDX’s solution but asks to be notified if the VDX date slips.

6.4 Digital Content Contract Breach Procedures

Over the past few months, there have been instances when vendors have informed us we are in breach of contract. CDL has developed instructions and procedures around breach of contact.

Concerns were raised that the document errs on the side of monitoring usage and requires libraries to identify all suspicions of breach in addition to known breaches. It should be made clear that documenting as outlined must be done for breaches reported by a vendor, and that otherwise the document serves as guidelines for breach procedures. The form could also be

streamlined (amount of information to be collected seems excessive), and revised for adaptation for local procedures. Further discussion and experience may reveal a need to develop different procedures for the different types of breaches (e.g., discovered by us, discovered by vendor, breach by vendor, etc.).

ACTION: Ober will take comments back to CDL for document revision.

7. AIM—Ongoing Discussion

Ober reported that there was much discussion about access integration at the DLF forum. He and others shared anecdotal evidence that the AIM report is being used and referenced in project design and development within the UC libraries.

8. All Campus Groups—Update

8.1 CDC

CDL has had preliminary discussions with JSTOR about the possibility of UC creating a dark archive of JSTOR print.

8.2 HOTS

HOTS has developed a flowchart of the Shared Cataloging Program Advisory/Policy Structure.

ACTION: Miller will ask HOTS to share the chart with SOPAG.

8.3 LPL

LPL is developing a privacy website for the public based on the information provided on the SOPAG Task Force website.

UCB is hosting a workshop lead by the LPL liaison and legal counsel on the Patriot Act and have invited other campuses.

ACTION: Kochi will find out if Melvyl-T is using the draft privacy policy. Kochi will also find out if campuses have begun privacy audits.

8.4 LTAG

LTAG has provided preliminary information on teleconferencing.

LTAG has also developed list of enhancements for the Ariel software. The document has been shared with RSC and M. Heath, and they will help prioritize the items.

8.5 RSC

The RSC Steering Group is working on revision of the charge for a group to explore a UC resource sharing code. The Steering Group will write the mission and outline policies and issues to be explored and will give to SOPAG for review.

An election for new chair is taking place, and the results will be reported to SOPAG next month.

9. Review of Progress on SOPAG Activities

ACTION: Kochi will update the SOPAG Activities list developed by A. Bunting and coordinate with G. Lawrence.

10. SOPAG Meetings

June meeting will be a conference call (time to be determined).

ACTION: Tanno will arrange the conference call.

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