

HOTS Conference Call
December 10, 2012
2:00-4:00

Present: Karleen Darr (Chair, UCD); Vicki Grahame (UCI, recorder), John Riemer (UCLA), Jim Dooley (UCM), Manuel Urrizola (UCR), Linda Barnhart (UCSD), Anneliese Taylor (UCSF), Catherine Nelson (UCSB), Marcia Barrett (UCSC), Louise Ratliff (LAUC) Patti Martin (CDL) Emily Stambaugh (CDL)
Absent: Lisa Rowilson de Ortiz (UCB),

1. Discussion of CAMCIG's SPIP guidelines with guest Emily Stambaugh

We discussed Emily's feedback on the guidelines and the responses to CAMCIG's questions.

- **Grandfathering prior owned volumes of a series into shared print to facilitate ease of cataloging.** There are some concerns about bibliographers about committing to this. The agreement asks for only new titles to be committed using April 2012 as a starting date. HOTS could ask CDC to reconsider this if we wanted to recommend including retrospective volumes of the series.
- **Display of shared print in Melvyl, how to make it less confusing to users.** The newly charged West Coordinating Committee will be looking at the additive/substitutive approaches. Campuses are already using the new shared print OCLC symbols for these shared series.
- **Whether to add a shared print label to the material in addition to the UCL Shared Print ownership stamp.** We discussed the use of a spine label to distinguish these shared series in order to alert patrons and staff about their special nature. Some of us plan on using the label.
- **Maintaining a central list of shared print in place packages or projects and maintaining standard identifiers in the 793 field as an interim strategy.** We all agreed that it is a good idea for CAMCIG to maintain this list. It is best to keep on the wiki and on the SPIP website

CAMCIG's SPIP Medium Term Guidelines.

These guidelines were accepted by HOTS in October. Emily notes that the implementation of these guidelines by campuses is "a very good step forward" We discussed Emily's general suggestions for a long term plan (2013-14)

- Implementation of the OCLC Shared Print Metadata Guidelines
<http://www.oclc.org/us/en/productworks/shared-print-management.htm> for UC's shared monographs. This may include a review of the OCLC guidelines perhaps in collaboration with OCLC, adaptation of them for shared monographs, testing, implementation and adjustments to any downstream systems or processes. I'd be happy to coordinate, advise or participate in this if that'd be useful.

- Reclamation effort to upgrade all other UC shared print collections to the OCLC Shared Print Metadata Guidelines, particularly the largest journal collections. CDL may be able to support the one-time reclamation projects and would be interested in proposals.

It was noted that the OCLC guidelines are for serials only and that WorldCat Local does not support LHRs for monographs. Changing this would be a huge effort because it would entail changing the underlying architecture. Using LHRs on monographs creates extra work for ILL staff because they would need to mediate these requests.

ACTION: engage OCLC and UC to develop metadata guidelines for monographs

Analytics or not? An argument can be made that because these series are shared and non-managing campuses are making intentional choices not to collect them based on another campus' commitment to manage them collectively, the shared series should be analyzed. If resource constraints don't allow this, it might be useful to keep a list on CAMCIG's website of which campuses are taking each approach.

ACTION: Ask CAMCIG to include whether a title is analyzed or not on the inventory list they are maintaining

Serial Record with LHR : We discussed that a serial record with a LHR for these shared series would be helpful

ACTION: Karleen will ask CAMCIG if campuses are following this practice

ACTION: We will find out what our TS departments are doing and let HOTs know

2. HathiTrust holdings data (Patti)

HathiTrust announced it is using data submitted by partner institutions to the Holdings Database to facilitate access on library premises to in-copyright works that fall under Section 108.

There is now a real application for the optional holdings and condition data submitted to the HT Holdings Database. Not all campuses have this data, but for those that can provide it there is now a real application.

3. UC-WEST Coordinating Committee (Ad Hoc) -- Patti, John and Vicki are members of this new group which had its first call today. This is an ad hoc group charged by SOPAG to develop coordinated operational policies and procedures to support and facilitate UC's participation in WEST. Areas of specific concern to the UC Libraries (UCL) include:

- Development of UCL systemwide policies
- Coordination and consistency in policy and practice among UC campuses
- Operational and policy guidance on UC-WEST implementation
- Implications for UCL Regional Library Facilities policies, procedures and workload
- Implications for Technical Services policies, procedures and workload
- Implications for other ongoing activities not directly related to WEST, such as community-wide interlibrary loan

ACTION: We will include the list of issues developed by the WCC on our next meeting agenda to share with HOTS

Next meeting minutes: Lisa Rowilson de Ortiz