

**Cataloging and Metadata Common Interest Group  
Annual Report  
July 1, 2006 – June 30, 2007**

**Background:**

The Cataloging and Metadata Common Interest Group (CAMCIG) was appointed by HOTS and approved by SOPAG in August 2006. The group had its first meeting in person at UC Irvine on September 12 and since then has met by a standing monthly 90-minute conference call.

CAMCIG membership includes: Armanda Barone (Berkeley), Rebecca Doherty (CDL), Karleen Darr (Davis), Brad Eden (HOTS liaison), Vicki Grahame (Irvine), Sara Layne (Los Angeles), Jim Dooley (Merced), Manuel Urrizola (Riverside), Linda Barnhart (San Diego; Chair), Beatrice Mallek (San Francisco), Amy Weiss (Santa Barbara), and Lai-Ying Hsiung (Santa Cruz).

The CAMCIG Web site may be found at <http://libraries.universityofcalifornia.edu/hots/camcig/>. Thanks are due to Michael Stuart (UCSD Metadata Services Dept.) for acting as Webmaster, and to Steve Toub and CDL for providing server space. In addition to the usual documents (charge, roster, minutes, reports), the Web site includes a “member orientation” section which provides quick access to the cataloging departmental home pages for each of the campuses, including the org chart, statistics, and policies and procedures (when available).

One specific point in CAMCIG’s charge specifies: “The activities and accomplishments of the CAMCIG will be reviewed by HOTS one year from the date of its appointment. HOTS will prepare a report to SOPAG including a recommendation as to whether the group should continue.” It is CAMCIG’s unanimous recommendation to HOTS that this group continue. This initial, formative year has demonstrated the value in having a formal mechanism for communication among all ten catalog/metadata departments and the benefits of having a strong peer network. The accomplishments below further document that CAMCIG is a useful and productive avenue that enables further collaboration across the UC libraries, particularly as discovery, access, and data management strategies are being revisited.

**Activities and Accomplishments:**

CAMCIG had a very active year. Well aware of the interest in increasing collaboration and reducing redundancy across the UC system, CAMCIG worked on a variety of issues:

- **Prepared the report “Using OCLC as a single cataloging tool/data source”** in November 2006 in response to a HOTS/SOPAG request, which included assigning and receiving a report from a subgroup about WorldCat.org. The report is available at <http://libraries.universityofcalifornia.edu/hots/camcig/usingOCLCAsASingleCatalogingTool.pdf>  
Appendix B of this document, “**UC Data in the OCLC Database,**” was a major contribution to shared UC knowledge by providing concrete evidence of the extent of records missing from the OCLC database.
- **Prepared the report “Reexamination of the single record policy for serials: Preliminary Report”** in conjunction with the SCP Advisory Committee in December 2006 in response to

a HOTS request. The report is available at <http://libraries.universityofcalifornia.edu/hots/camcig/Single-SeparateRecordReporToHOTS.pdf>

- **Campus practices documents** were created to document current practices as we discussed various issues. Examples include series authority control, music relator codes, and updating holdings on OCLC. These documents are available at <http://libraries.universityofcalifornia.edu/hots/camcig/campusPractices.html>
- **Discussed concerns and shared information about digitization and metadata infrastructures and projects** on each campus.
- **Discussed opportunities for UC-wide training** on metadata standards and practices. Assigned a subgroup to survey campus needs in this area. Survey results are available at <http://libraries.universityofcalifornia.edu/hots/camcig/metadataSurveyResults.pdf>
- **Provided an important communication mechanism for WorldCat Local pilot information and feedback.** We are in the process of assigning a subgroup to follow up on the recommendations of the Local Bibliographic Data Team, which advised more standardization of local bibliographic data.
- **Monitored and advised the UC CONSER funnel on standards and activities**  
See appended report from Valerie Bross, UC CONSER funnel coordinator.
- **Discussed campus policies on relator codes and relator terms** so that SCP could distribute Naxos records. Further standardization work may need to be done in this area.
- **Discussed cataloging strategies for cataloging copies upon request of individual digitized books from mass digitization projects**
- **Monitored developments in electronic thesis and dissertation (ETD) bibliographic access**
- **Assigned a subgroup to work on a policy for microform masters**, at the request of SRLF. Their report is expected in September 2007
- **Provided feedback on the “Models for Collaborative Cataloging Across UC Campuses” report** to HOTS in February 2007, and expect to continue discussing this in the future

#### **Goals and objectives 2007-08:**

1. In support of the WorldCat Local pilot and beyond,
  - Provide backend support for bibliographic and holdings record projects
  - Surface and forward or resolve specific issues
  - Share information
  - Provide feedback on pilot
  - Develop and promote efficient workflows

2. Continue to increase collaboration and reduce redundancy across cataloging units.
  - Monitor subgroup assigned to standardizing local bibliographic data practices
  - Develop best practices for updating OCLC holdings (post-reclamation projects)
3. Develop and recommend shared cataloging and metadata policies and practices for the University of California Libraries.
  - Master microforms policy under development
  - Electronic theses and dissertations cataloging workflows and policies
  - Metadata practices and elements for mass digitized content
4. Collaborate on developing and/or implementing new strategies for managing the technical services aspects of cooperative or shared collection initiatives in consultation with the Shared Cataloging Program Advisory Committee (SCP AC).
  - Work with the SCP AC on the single/separate record question in concert with the needs of the WorldCat Local pilot
  - Continue monitoring and advising the work of the UC CONSER funnel

**UC CONSER Funnel  
Annual Report  
8/27/2007**

The UC CONSER Funnel, established March 2006, provides a mechanism for UC serials catalogers to share cataloging work through permanent enhancements to OCLC master records for serials. FY2006/2007 has seen significant growth of the Funnel. Here are some highlights:

- **Statistics:** Excluding UCLA and UC San Diego, during FY2006/2007, UC catalogers authenticated or enhanced over 900 OCLC Master records for CONSER serials and also enhanced over 250 additional non-CONSER records.
- **Site visits:** UC CONSER Funnel campuses hosted site visits at three campuses. Melissa Beck, Adolfo Tarango, and Valerie Bross participated in site visits. In preparation for Berkeley's participation, Carole McEwan organized two site visits with the reviewers, Melissa Beck and Valerie Bross, one July 17, 2006; the other, September 13, 2006. Taking advantage of proximity, Melissa Beck completed a follow-up site visit in September 16, 2007 to UC Davis to discuss CONSER questions with Sarah Gardner and her catalogers. Finally, on June 7, 2007, Elaine McCracken hosted a site visit at UC Santa Barbara with Melissa Beck and Adolfo Tarango in June 2007.
- **Review and independence:** During FY2006/2007, two campuses gained independence in maintenance activities; and one new campus began the review process. UC Davis and UC Irvine gained independence in CONSER maintenance activities. At UC Davis, Sarah Gardner is liaison; CONSER work was reviewed initially by Melissa Beck; later by Adolfo Tarango and Margaret Christean. At UC Irvine, Todd Butler was liaison; Valerie Bross, reviewer. In spring, 2007, UC Davis began "phase two" review for authentication and entry of original CONSER records with Melissa Beck as reviewer. Finally, UC Santa Barbara began review in June. Elaine McCracken is liaison at UCSB; with Adolfo Tarango and Margaret Christean, reviewers.
- **Web activities:** During this period, Renee Chin (UCSD) served as Web designer/coordinator and listserv discussion groups maintainer for the UC CONSER Funnel. The Funnel supports two online discussion groups, one for the planning group, the other, a general group for all participants. In January, 2007, following the Midwinter meeting of ALA, Rachel Barnhart at UCLA helped set up a test blog to promote discussion of the CONSER Standard Record; Renee Chin assumed responsibility for the blog.
- **Training:** Manuel Urrizola, Adolfo Tarango, Rhonda Lawrence, Melissa Beck, and Valerie Bross were all involved in training activities during this period. First, Carole McEwan (UC Berkeley) organized an SCCTP Basic Serials Workshop on July 13-14, 2006 with Adolfo and Manuel as co-presenters. Later that fall, September 14-15, 2006, Carole McEwan organized another workshop, the SCCTP Advanced Serials Workshop, with Rhonda Lawrence, Melissa Beck, and Valerie Bross as co-presenters. FY2006/2007 year ended with Melissa Beck and Valerie Bross organizing a pair of Live Online sessions (on the CONSER Standard Record), to test the use of distance learning to bring training to participants in the UC CONSER Funnel.