

DRAFT
Cataloging and Metadata Common Interest Group
Annual Report
July 1, 2007 – June 30, 2008

The Cataloging and Metadata Common Interest Group (CAMCIG) was appointed by HOTS and approved by SOPAG in August 2006. CAMCIG membership includes: Armanda Barone (Berkeley), Rebecca Doherty (CDL), Karleen Darr (Davis), Brad Eden (HOTS liaison and Santa Barbara), Vicki Grahame (Irvine), Sara Layne (Los Angeles), Jim Dooley (Merced), Manuel Urrizola (Riverside), Linda Barnhart (San Diego; Chair), Beatrice Mallek (San Francisco), and Lai-Ying Hsiung (Santa Cruz). Most CAMCIG business was accomplished by conference call, but one in-person meeting, largely devoted to WorldCat Local planning, was held November 29, 2007 at CDL. The CAMCIG Web site may be found at <http://libraries.universityofcalifornia.edu/hots/camcig/>

Below are the goals and objectives that CAMCIG set for itself for 2007-08, and the activities that we undertook to meet them.

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

CAMCIG received information from the Joint Working Group on Collection and Cataloging (a subgroup of the UC/OCLC Implementation Team) and shared information related to missing records, OCLC holding symbols, local bibliographic records, local holdings records, reclamation project planning, and duplicate OCLC numbers in local ILSs. The group developed a better understanding of the WorldCat Registry, and of the complexity of OCLC number indexing in local ILSs. CAMCIG contributed profiles for each campus for the new SCP holding symbols in OCLC. The group discussed the implications of working in OCLC instead of in local ILSs for cataloging, to be able to “catalog at the network level;” see fuller discussion under Goal #3.

Brad Eden contributed a white paper “New Approaches for Systemwide Cataloging Initiatives” which stimulated considerable discussion both within CAMCIG and beyond.

2. Continue to increase collaboration and reduce redundancy across cataloging units.

CAMCIG developed, discussed, and posted the results of several polls of campus practices:

- OCLC record numbers, and where they are found, indexed, and maintained
- 655 (genre headings) indexing practices
- Local bibliographic data (still in progress)

The group had discussions about the Shared Cataloging Program, particularly regarding options for California documents cataloging in the wake of SCP's 18% budget cut. See the text for Goal #4 for a fuller description.

3. Develop and recommend shared cataloging and metadata policies and practices for the University of California Libraries.

CAMCIG considered a question from HOTS regarding the implications of cataloging directly in OCLC. CAMCIG's response noted that Enhance authorizations would need to be increased; a different level and number of staff that may be required in this environment; workflows would need to be changed; transmitting the information back to local ILSs might need to change; the increased use of the OCLC Bib Notification Service might be helpful; and, the use of Institutional Records would need to be clarified.

A subgroup on a policy for master microforms at the RLFs submitted its report. After review, CAMCIG recommended a separate record policy, contrary to the subgroup's recommendations. The subgroup was asked to redraft its guidelines and address how to handle legacy records. After progress was stalled, the group was thanked and disbanded.

Later in the year, a question on coding reprint deposits arose from SRLF and CDC. A subgroup will be appointed to draft a common coding practice for identifying reprint materials sent to the RLFs. In addition, the group will be asked to handle the master microforms policy, which is related.

CAMCIG revisited and updated the "UC Standard Practice for Cataloging Dissertations," implementing a genre heading (instead of the former local subject heading) to collocate dissertations across the ten campuses. The new policy was implemented on March 1, 2008.

At the request of HOTS, CAMCIG discussed Institutional Records (IRs) in OCLC and formulated a written response.

CAMCIG briefly discussed the techniques for implementing the new coding for integrating resources.

CAMCIG continued with round-robin type sharing to keep everyone updated on cataloging and metadata-related activities at each campus. The group also informally shared information on workflows and insights provided to various UC campuses by R2 consultants.

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).

CAMCIG continued monitoring and advising the work of the UC CONSER funnel (the annual report of that group is appended here).

A discussion of the serious problems of a potential SCP budget cut resulted in a strong letter of support for the Program being sent to the University Librarians and HOTS.

The subsequent cut of California documents cataloging by SCP for FY 2008-09 led to the most dominant topic for CAMCIG's conversation for the year. Various ideas and proposals were floated to develop new collaborative approaches to CalDocs cataloging. One CAMCIG member worked closely with the California State Library to understand their constraints and needs, and CAMCIG had frequent online and in-person conversations with GILS members as ideas surfaced. After consultation and consideration, two complementary proposals were accepted for testing: (1) agreement by five campuses to divide up the GILS agency list to ensure original cataloging of the electronic documents from those agencies; and (2) an automated harvesting technique to be used by SCP to gather new and updated CalDocs in WorldCat and distribute them, without manual review, to the campuses. Still to be resolved are concerns about archiving the digital content.

Goals and Objectives for 2008-09

1. Support WorldCat Local implementation, should it be approved after the pilot stage.
2. Continue to increase collaboration and reduce redundancy across cataloging units.
3. Develop and recommend shared cataloging and metadata policies and practices for the University of California Libraries.
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).

UC CONSER Funnel Annual Report for CAMCIG
Prepared by Valerie Bross, UCLA
9/3/2008

In Mar. 2008, the UC CONSER Funnel celebrated its two-year anniversary. During the first year, the Funnel steering group and liaisons developed site training resources, communications tools (a Web site and a discussion group), and procedures for the review process. This past year saw continued growth of the Funnel; development of new tools for training; and, in the end, discussion of future directions for the Funnel.

The Steering Group for the Funnel during this period consisted of Renee Chin (Communications Coordinator), Melissa Beck (Training Coordinator), and Valerie Bross (general Coordinator). Funnel Liaisons were: Adolfo Tarango (UCSD), Sarah Gardner (UC Davis), Carole McEwan (UC Irvine), Elaine McCracken (UC Santa Barbara), Lisa Rowlison (UC Berkeley), and Sharon Scott (UC Riverside).

Funnel Highlights July 2007-June 2008

Statistics

Between July 2007 and June 2008, UC campuses contributed to the CONSER database 452 original records and authenticated 534 records. UC campuses maintained 2779 existing CONSER records and 209 related non-CONSER records.

Site Visits & Review

UC CONSER Funnel completed two site visits during FY2007/2008. In Aug. 2007, Peter Fletcher, Melissa Beck, and Valerie Bross met with catalogers at UC Irvine for a follow-up visit. After the visit, Peter Fletcher served as a resource person for CONSER catalogers at UC Irvine until Carole McEwan started work there; Peter still assists with review for Irvine. Then in Feb. 2008, Sarah Gardner and Melissa Beck completed initial training at UC Riverside. Sarah Gardner will be working with Sharon Scott as CONSER reviewer.

In January 2008, Lisa Rowlison became the Funnel liaison for UC Berkeley; in spring 2008, she completed a site visit with Sarah Gardner. Following this introduction to Funnel procedures, Adolfo Tarango and Margaret Christean began working with Lisa on CONSER maintenance review.

Melissa Beck developed or revised the following training materials for use in site visits and follow-up sessions: "CONSER = Cooperation," "Maintaining CONSER Records," and "Modifying Pre-AACR2 Records."

Training

In FY2007/2008, members of the UC CONSER Funnel experimented with delivery of workshops through the Internet. In July 2007, Melissa Beck and Valerie Bross, with the support of Amigos, presented two SCCTP distance learning workshops for UC CONSER Funnel members on the CONSER Standard Record. Melissa Beck and Linda Geisler presented an expanded version of the workshop in August 2007; the workshop was also given by Peter Fletcher and Steve Shadle in November 2007.

Members of the Funnel also continued to provide in-person SCCTP workshops. In December 2007, Adolfo Tarango, Melissa Beck, and Manuel Urrizola presented the SCCTP Basic Serials Workshop in San Diego. A revised version of the workshop was also given January 2008 by Melissa Beck, Peter Fletcher, and Valerie Bross.

As part of ALA Annual meeting, Melissa Beck, Peter Fletcher, Adolfo Tarango, and Valerie Bross participated in a review of the SCCTP Basic Serials Cataloging Workshop. This full-day session included a review of the CONSER Standard Record, revision of SCCTP workshops, and a critique of SCCTP Basic Serials Cataloging modules.

Communications

Renee Chin continued to maintain the UC CONSER Funnel Web site and discussion group. Her experiments sharing discussion notes from UCSD's Cataloging Fun Group were well received; her case studies also enhanced the usefulness of the group. In May 2008, Renee Chin developed, tested, and analyzed the results of a SurveyMonkey survey to assess communication needs of Funnel members (see <http://libraries.universityofcalifornia.edu/hots/conser/communicationsurvey.pdf> for full report). Based on her analysis, Renee recommended some innovations to try in the coming year, to encourage greater use of the Funnel communication tools.

Several members of the UC CONSER Funnel experimented with one other Web 2.0 tool for communication: Second Life. Holly Tomren (UC Irvine) and Esther Grassian (UCLA) helped plan a "Pre-Meeting" on May 23, 2008 to orient Funnel members to this virtual world. Esther Grassian, with the assistance of Rhonda Super, guided Antsera Galicia, Caz Zapatero, Ivan Groznyi, and Vee Milena through the SL UCLA Library. Photos from the Pre-Meeting have been posted to the UC CONSER Funnel Web site.

Celebrating the Funnel

On May 16, 2008, the UC CONSER Funnel Liaisons and Steering Group held a telephone meeting to recognize the achievements of the Funnel on its two-year anniversary, share news, and discuss future goals for the Funnel. Among the topics, the group discussed: (1) the need for further opportunities for liaisons and steering committee discussion; (2) the possibility of holding a face-to-face meeting for UC CONSER Funnel members; (3) further development of the Web site (e.g., an FAQ).

Sarah Gardner successfully submitted a proposal for a Tactics session, "Harnessing the Spiderweb: Challenges and Solutions," for the NASIG Annual Meeting in June, 2008. She, Melissa Beck, and Valerie Bross presented an overview of the UC CONSER Funnel from Pat French's original vision through current activities.

The success of the NASIG presentation led to an invitation from Les Hawkins for a follow-up presentation during ALA Annual at the CONSER at Large session. Adolfo Tarango, Carole McEwan, Melissa Beck, and Valerie Bross provided perspectives on the achievements of UC CONSER Funnel.