

Brainstorming Draft for CAMCIG

New Approaches for System-wide Cataloging Initiatives

Here is what we have so far:

1. Keeping in mind the guiding principles of the BSTF report:
 - Reducing redundant cataloging processes across campuses
 - Reducing the redundant effort in the training and retention of language specialists in cataloging
 - Exploring new cataloging practices
 - Coordinating cataloging expertise and practices across the entire system
2. From “Models for cooperative cataloging draft” 1/30/2007

Acknowledging the fact that, given the wide range of challenges (monograph/serial, formats, languages), the complexity of projects and tasks, the varying levels of staffing and expertise, and the fast pace of change, it seems that a one-size-fits-all approach will not work for every situation. Rather, UC might benefit more from the model of a menu, where one can choose from a range of options or techniques. Projects or needs can be more carefully and effectively matched knowing the advantages or drawbacks of each approach.

Examples of some “menu choices” might include:

Independent approaches

- ❖ Outsourcing all materials (sending all cataloging to an external vendor)
- ❖ Outsourcing original cataloging only (sending all original cataloging to an external vendor but handling the copy cataloging in house)
- ❖ Outsourcing selected or special materials
- ❖ Obtaining catalog records from the vendor from which the materials are purchased

Coordinative approaches

- ❖ Shared expertise (independent units advise each other)
- ❖ Centralized standards (all units agree upon standards and best practices)

Cooperative approaches

- ❖ Cooperative efforts (units (some, or all) pool their resources to accomplish a specific task)
- ❖ Sharing tasks (one campus does one part of a task, and another campus does another)

Collaborative approaches

- ❖ Developing a “center of specialization” for a specific niche area which UC campuses could utilize as needed
- ❖ Developing a central (shared) contract with an external vendor that a subset of campuses could utilize
- ❖ Centralized insourcing (one centralized resource for all UC campuses to utilize (e.g., SCP))
- ❖ Regional insourcing (one resource/agency in the north and another in the south)
- ❖ Bilateral or trilateral agreements (an arrangement made between two (or three) campuses to leverage cataloging)

For more on OCLC’s vision towards new directions in bibliographic and metadata control, see Karen Calhoun’s presentation to Members Council:

http://www.oclc.org/memberscouncil/meetings/2008/october/wc_future_bib_control.ppt

Moving towards a brainstorming session, here are some dramatic yet viable alternatives/changes/options for moving the UC system towards a unified, united consortial model for **redundant** technical services functions, including bibliographic records downloaded during the acquisitions process. They are ideas to generate controversy, discussion, and yet more ideas. Nothing should be off limits!

1. Develop a consortial database documenting when each campus has people leave or retire in technical services; charge a continuing task force to look at each position as it comes open, and begin to move towards a centralized technical services operation for the system (i.e., one location to take care of all redundant, copy cataloging operations, one master bibliographic record).
2. Look at setting up a centralized technical services operation for the system in another state with a lower cost of living (i.e., Nevada, Idaho), where all shipments could be sent, all acquisitions could be funneled and then sent out to the various campuses, a master record set up, and where staff could and would be paid appropriately and be able to afford a decent standard of living, and focus could be placed on long-term training and professional development for these individuals as a model to replace LC as a national cataloging center.
3. Start with specialized centers of cataloging, such as California state and federal government documents, where we could work with the State Librarian to centralize all cataloging in one location (Sacramento?), with a group of catalogers doing these documents for the entire system as well as for everyone else in the world.
4. Same could be applied to various language specializations, as people retire, leave, or projects develop. We have done this with the Chinese cataloger model.

5. Do a SWOT analysis of moving cataloging (and perhaps all major technical services functions) to a centralized model. See http://www.mindtools.com/pages/article/newTMC_05.htm for an example/worksheet.
6. Initiate a state-wide reclassification effort, to bring library employees salaries and duties up-to-date and in line with where we see them working and what we see them doing in the future (Nevada did this).
7. Immediately work with OCLC to join their pilot project to capture ONIX metadata and ingest it automatically into WorldCat Local as a consortial model. Form a task group to examine implications and opportunities for change based on the success of this endeavor. See <http://www.oclc.org/news/releases/200688.htm> and <http://www.oclc.org/productworks/nextgencataloging.htm>
8. Charge CDL to prioritize the development of acquisitions tools and cataloging scripts that automatically download all types of metadata into our new Melvyl model, allowing campuses to begin to move away from localized proprietary vendor catalogs to the one master bibliographic record model. Charge a task group that would prioritize the work of CDL programmers and staff towards this end, with regular meetings, regular updates, regular projects, and more of an R&D approach to moving in this direction.
9. Establish a system-wide communication approach that involves all UC library technical services staff, assisting them locally in moving towards any new consortial models, as well as providing them forums and opportunities to contribute ideas and comments quickly and efficiently as changes are announced and enacted. Town hall meetings, teleconferences, local forums, and Library 2.0 tools could all be used towards this effort.