

**Cataloging and Metadata Common Interest Group  
Annual Report  
August 1, 2008 – July 31, 2009**

The Cataloging and Metadata Common Interest Group (CAMCIG) was appointed by HOTS and approved by SOPAG in August 2006. The UC CONSER Funnel program reports to CAMCIG. Their annual report is appended here. CAMCIG membership includes: Armanda Barone (Berkeley; Chair), Rebecca Doherty (CDL), Xiaoli Li (Davis), Brad Eden (HOTS liaison and Santa Barbara), Wanda Jazayeri (Irvine), Sara Layne (Los Angeles), Jim Dooley (Merced), Manuel Urrizola (Riverside), Linda Barnhart (San Diego), Nina Meechoonuk (San Francisco), and Lai-Ying Hsiung (Santa Cruz). All CAMCIG business was accomplished by conference call. 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 2008/09, and a highlight of activities that we undertook to meet them.

**Highlight of Activities in 2008-09**

I. Support WorldCat Local implementation, should it be approved after the pilot stage.

- Discussed how local information should be mapped from our bibliographic records to the new fields in LHR
- Discussed local information collected via campus survey. Survey indicated that we had a consensus on the key types of copy specific information to be indexed and displayed. It also revealed that campuses were willing to standardize by choosing one field to use for each type
- Began to plan UC-wide LHR training: CAMCIG sub-group met with the OCLC Western Training and Support Coordinator, Margi Mann.
- Testing: UCSB, UCLA, and UCI involved in LHR testing with OCLC.

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

1. Next Generation Technical Services (NGTS): Important to note that several CAMCIG members are currently serving on the NGTS Steering Team (Armanda Barone, Jim Dooley), and several are represented on the four NGTS teams:

Team 1 (Commonly Held Content in Roman Script): Linda Barnhart

Team 2 (Commonly Held Content in Non-Roman Script): Armanda Barone

Team 3 (UC Unique Collections): Jim Dooley

Team 4 (21<sup>st</sup> Century Emerging Resources): Brad Eden

2. Shared Print Steering Task Force: The draft document “Bibliographic Standards for Shared Print Monographs” was reviewed and discussed several times, with CAMCIG members providing comments. More information on the work of the Shared Print Steering Task Force can be found at:

[http://www.cdlib.org/inside/groups/spstf/SPSTFchargerevised\\_03\\_20\\_09.doc](http://www.cdlib.org/inside/groups/spstf/SPSTFchargerevised_03_20_09.doc)

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

1. Separate record policy for government document monographs:

In February 2009, CAMCIG approved the use of separate records for government document monographs aligning us with a prior policy decision by the GPO. Historically, UC followed a separate record policy for all monographs except government documents. With this change in UC policy all monographs will be catalogued using the separate record approach.

2. UC Standard Practice for Cataloging UC Theses and Dissertations:

The May 1, 2008 CAMCIG policy was revised to include language about use of the \$y for chronological subdivisions.

3. CAMCIG Training Initiative: Working at the network level

In Fall/Winter 2009, OCLC announced plans to loosen its restrictions on the editing of bibliographic records in the hopes that more members of the cataloging community would contribute their expertise to improving and enhancing the quality of WorldCat. CAMCIG discussed and moved forward with a pilot training initiative. The goals of the training initiative were to:

- Prepare UC to participate in the Expert Community Experiment
- Develop training for both copy-catalogers and original catalogers regarding data that should be included in the OCLC master record and data that should be recorded elsewhere
- Raise awareness about the implications of local policies and making local changes to bibliographic records; inspire questioning of established practices
- Explore new methods of delivering training system-wide
- Develop guidelines for level of expertise and knowledge required to catalog at the network level

In March 2009, CAMCIG sponsored a one-hour webinar (via Elluminate) on how to work with "Parallel and Non-English Records" in WorldCat-- how to recognize non-English records, how to recognize (and correct) "hybrid" records, and how to

create links from our English records to non-English records. This webinar represented the first time that UC-specific training had been delivered to catalogers at all 10 UC campuses simultaneously-- and without involving any travel time or expense for the participants or the presenter(s). The webinar reached approximately 100 participants at all 10 UC campuses simultaneously. There were just 32 connections to the webinar, but connections at UCB, UCSD, UCSB, and UCLA (and possibly other campuses) were to rooms containing up to 30 participants each. Participants who felt more comfortable using their individual workstations were able to do so. The webinar was so successful that OCLC used it as a basis for a workshop on the same topic.

The parallel record policy was chosen as a possible pilot project because:

- CAMCIG had identified this topic as one that would benefit from system-wide training
- Training content could be developed quickly
- CAMCIG policy decision was needed regarding use of non-English records

PowerPoint slides of the webinar and Q&A can be found at:

<http://libraries.universityofcalifornia.edu/hots/camcig/UCtraining.html>

IV. 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).

1. By far, the activity that consumed the most amount of CAMCIG members' time (from Spring 2008-Summer 2009) was the California Electronic Documents Cataloging Pilot Project. CAMCIG began discussions in Spring 2008 about new approaches to California electronic document cataloging in response to a looming cut to UC's Shared Cataloging Program (SCP) budget. The \$48,000 budget cut, effective July 1, 2008, reduced SCP staff levels and made continuing their California document cataloging impossible. Recognizing that the critical work of electronic state document cataloging and record distribution must continue, CAMCIG approved two complementary proposals that would share the intellectual work through collaborative effort and take advantage of automated processes. Details of the pilot can be reviewed at:

[California Electronic Documents Cataloging Pilot Project](#)

The most problematic work flow proved to be the harvesting for copy. A great deal of time and effort was spent trying to fine-tune the harvesting and distribution of records. The dramatic change to a fully-automated process (with no possibility for manual review) has been a struggle for all. UC should be proud of the work involved in inventing and reinventing this new model.

Early in the pilot project CAMCIG members voiced concerns about pursuing further discussions and activities with respect to archiving the CalDocs. Along with providing cataloging, CAMCIG (via staff at UCB) has been testing the possibilities with regards to archiving of CalDocs utilizing (1) OCLC's ContentDM and (2) CDL's Web Archiving Service. It is possible that archiving at point of cataloging projects could increase depending upon Next Gen Technical Services initiatives, so these initial test may help information gathering for future projects.

2. WorldCat Record Policy (<http://www.oclc.org/worldcat/catalog/policy/>): An issue asked by HOTS to review. Consensus of the group was to wait and see what directions this would take.

### 3. CAMCIG Subgroup on Reprint Coding Report

This report responded to the October 14, 2008 charge #1 developed by CAMCIG in response to the RLF's need to have reprints identified as such when they arrive for deposit. The charge was to:

*"Prepare guidelines that will define a common coding practice for identifying reprint materials (both monograph and serial) sent to the RLFs. Please define 'reprint' so that campuses will share a common understanding. For materials already in the RLFs, will any actions be required of the campuses or of the RLFs?"*

In order to fully understand how campus' current and legacy practices with respect to reprints contribute to the reprint problem at the RLFs, the Subgroup put together a six-question survey which was distributed to CAMCIG members in November, 2008. The responses from all the campuses were compiled into one Excel spreadsheet.

The complete report and survey can be reviewed at:

<http://libraries.universityofcalifornia.edu/hots/camcig/ReprintReport.pdf>

<http://libraries.universityofcalifornia.edu/hots/camcig/ReprintReportAppendixC.xls>

Campuses are now in the process of implementing the recommendations effective July 1<sup>st</sup>, 2009.

### 4. Report on Cataloging of Preservation Microfilm

This report responds to the 14 October 2008 charge #2 developed by CAMCIG in response to SRLF's need to process a large backlog of preservation microfilms. The charge was to:

“Prepare guidelines that will define a common cataloging practice for master negatives (both monograph and serial, including newspaper) sent to the RLFs.”

In order to fully understand campus' current and legacy practices with respect to cataloging of preservation microfilms, the subgroup put together a survey which was distributed to CAMCIG members in February 2009. The responses from the campuses were compiled into one Excel spreadsheet. The report and survey were reviewed and approved by CAMCIG and forwarded to HOTS for review and approval. HOTS approved the report and recommendations at their July 17<sup>th</sup> conference call.

### **Goals and Objectives for 2009**

1. Support Next Generation Melvyl Local implementation, should it be finalized.
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 cataloging and metadata aspects of cooperative or shared initiatives in consultation with the Next Generation Technical Services group(s), the Shared Cataloging Program Advisory Committee (SCP AC), the UC CONSER Funnel, and other groups.
5. Finalizing our recommendations for Caldocs harvesting/cooperative Caldocs cataloging efforts.

## **UC CONSER Funnel Annual Report for CAMCIG 8/14/2009**

During FY2008/2009, UC CONSER Funnel members focused on:

- Contributions to CONSER;
- Discussion of future directions for the group; and
- Exploration of new modes of communication.

The Steering Group for the Funnel for FY2008/2009 comprised: 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 Rowilson (UC Berkeley), and Sharon Scott (UC Riverside).

### Funnel Highlights July 2008-June 2009

#### **Statistics**

Between July 2008 and June 2009, UC contributions to the CONSER database increased significantly over those for FY2007/2008. UC campuses created original records for 532 serials (17% increase) and authenticated for CONSER 608 OCLC member records (13% increase). UC campuses maintained another 3790 CONSER records (36% increase).

#### **Future Directions**

At the end of FY2007/2008, members of the UC CONSER Funnel Steering and Liaisons Group began telephone meetings to assess services and consider future goals. These discussions continued during the summer of 2008, and culminated in a "Proposal to Expand the UC CONSER Funnel." The Proposal, which outlined scenarios for increasing regional support for CONSER activities, was submitted to CAMCIG in September 2008. While staffing and budgetary constraints limited consideration of the scenarios, the Funnel Group did receive approval to extend affiliate status to Bill Riddle at the California State Library for the creation of BibPURLs in records for California Documents. This affiliation occurred in conjunction with a request by GILS to facilitate link maintenance for online versions of California Documents.

Toward the end of FY2008/2009, the topic of link maintenance for California Documents re-emerged as a possible locus of activity for UC CONSER Funnel participants. At the ALA Annual Conference in Chicago, Lai-Ying Hsiung, Holly Tomren, Becky Culbertson, and Valerie Bross met informally to discuss this topic.

#### **Community-Building & Continuing Education**

In 2008/2009, UC CONSER Funnel catalogers continued to share news, questions, and documentation through a general UC Funnel discussion listserv and a Funnel liaisons/steering group discussion listserv (both maintained by

Renee Chin). During this period, participation in the general discussion listserv grew to 67 members.

In August 2008, the UC CONSER Funnel sponsored four sessions (Aug. 1, 15, 22, 29) to test the use of Second Life for Funnel meetings and training sessions. Rhonda Super (with occasional assistance from Esther Grassian) provided orientation sessions for the Funnel reps. While the experience was fun, we concluded that the Second Life required too steep a learning curve for occasional participants.

Fortunately, later that fall, a new opportunity surfaced: to pilot the use of Elluminate, a Webinar application. With the assistance of UC CONSER Funnel Liaisons and Steering Group members, I submitted a proposal for a series of sessions loosely-gathered under the title: "Meeting of Minds." The proposal was accepted in December; and between January and March, over eight sessions were brought to UC CONSER Funnel members. Aside from a wonderful CAMCIG-organized training session by Sara-Shatford Layne, these sessions included:

- Jan. 27, 28, 29: Coffee Klatch Series: ALA Midwinter Information Swap  
Total Participants: 5 participants (Jan. 27); 13 participants (Jan. 28); 10 participants (Jan. 29) from UCLA and other UCs
- Jan 14, Feb 6, and Feb. 26: Elluminate Orientation Sessions  
Total Participants: Jan 14 (9 participants) Feb 6 (8 participants), Feb 26 (3 participants)
- March 26, 2009: Picture This! xISSN & Serials Workflows  
Moderator: Constance Malpas, Timothy McCormick, Xiaoming Liu  
Total Participants: 89 seats (including the moderators) representing over 100 participants. Participants included UC campuses and registrants from across the US, and some Canadian registrants.
- March 31, 2009: Training Materials for RDA: A Modular Approach  
Presenter: Luiz Mendes  
Total Participants: 21 participants

Thanks to the UC CONSER Funnel members who participated in these sessions, we were able to successfully demonstrate the use of Elluminate for discussion and training. Renee Chin, the Communications Coordinator, provided significant technical support and encouragement both during the pilot phase and later.

Since the pilot, we have continued to offer sessions to UC CONSER Funnel and other UC catalogers. In doing so, we recognize our good fortune that UC campuses have, up to now, supported professional development and leadership; and that our colleagues have been willing to share their expertise and ideas. So far, UC CONSER Funnel members have enjoyed the following post-pilot Elluminate sessions:

- May 19, 2009: CONSER/BIBCO Annual Meeting

Presenters: Becky Culbertson, Prima Casetta, Adolfo Tarango, Valerie Bross  
Total Participants: 37-45 participants from UCLA, UC campuses, and Southern California

- June 25, 2009: NASIG Highlights

Presenters: Prima Casetta, Margaret Christean, Becky Culbertson, Bie-Hwa Ma, Carole McEwan

Total Participants: approx. 40 from UC campuses and Southern California

- July 23, 2009: "Many to One: The Provider-Neutral e-Book"

Presenter: Becky Culbertson; Moderator: Claudia Horning

Total Participants: over 70 from UC campuses, Southern California, and some other institutions