UC CONSER Funnel Conference Call, May 16, 2008
Time: 8:30-10:30am

Participants:
UCB: Lisa Rowlison
UCD: Sarah Gardner
UCI: Carole McEwan
UCLA: Valerie Bross, Melissa Beck, Peter Fletcher
UCSD: Adolfo Tarango, Renee Chin, Margaret Christean

Topics:
1. Round-robin: How is participation in the UC CONSER Funnel progressing at each of our campuses?

2. UC CONSER Funnel:
   For a refresher, documents on Funnel history are available
   at: http://libraries.universityofcalifornia.edu/hots/conser/about.html
   a. Structure: How should the UC CONSER Funnel organization change to better meet our needs?
   b. Communication: Recently Renee Chin carried out a survey. What were the results? How can we use this information to direct our efforts to improve & strengthen the Funnel?
   c. Extent: Should the Funnel expand past the UCs?
   d. Education: How can we provide more timely training to more people?

3. CONSER Standard Record: How is implementation going at our campuses?

Discussion:
1. Round-robin:
   a. What CONSER activities are going on at each of our campuses?
      UCLA: cataloging (creating, maintaining & authenticating serials, e-IRs, looseleafs); review (UCI). MMB to create FAQ for Funnel page. PVF to create FAQ on IRs
      UCSD: cataloging (creating, maintaining, & authenticating serials); review (1-2 records/month from UC Santa Barbara, UC Berkeley). RC completed survey & will begin carrying out the recommendations that resulted (see later in discussion)
      UC Davis: cataloging (creating, maintaining & authenticating serials); review (UC Riverside).
      UC Berkeley: cataloging maintenance review to begin next week. Will be sending 5-10 records per week to UCSD for review at the end of each week
      Irvine: cataloging maintenance (50-60 per month); Carole working with Peter Fletcher

   b. What factors will affect participation during the coming year?
      UCLA: R2 consultants' recommendations. OCLC Worldcat Local. RDA evaluation. New IR guidelines (manual now out on CONSER page)
      UCSD: SCP budget resulted in 100% of a position. 50% of that is Cal Docs; so no cal docs distribution through SCP for the year. The rest of the 50% will be spread over the rest of the work. SCP continues to look at streamlining batch processes. HOTS looking at an alternative funding model to ensure funding for SCP is not just stable but grows as the acquisition of e-resources grows. // UCSD is canceling more print in favor of online. Will continuing to work with UCSB, UCB; continue to contribute to the ongoing discussion of CSR. Adolfo presented an alternative model for Work records for serials to CONSER; during the coming year, will continue to develop the proposal.
      UCD: Tech Services is in the process of reorganization to begin implementation July 1st; as a result, government documents staff will be available for CONSER cataloging. Davis is in the middle of a reclamation project to represent RLIN records in OCLC. Davis also is contributing to OCLC Content DM for the State Library's documents. New AUL, Mary Page, begins June 15.

UCB: Lisa and her catalogers will be beginning the review process this year.
UCI: Irvine is continuing to cancel print for serials available online. Irvine will be evaluating an ERMS for titles in aggregators licensed by UCI.

2. UC CONSER Funnel organization
   a. Melissa Beck (Training Coordinator)
      1) Site visits: This past year, activities included site visits to UC Irvine (Peter Fletcher, Melissa Beck, Valerie Bross), UC Santa Barbara (Adolfo Tarango, Melissa Beck), and UC Riverside (Sarah Gardner, Melissa Beck). In addition, Lisa Rowlison met with Sarah Gardner at UC Davis for Funnel introduction.
      2) Training: In July, Melissa Beck and Valerie Bross delivered two live online (synchronous) training sessions via Amigos on the CONSER Standard Record to UC CONSER Funnel participants.
      3) Documentation: Melissa Beck developed or revised several training documents and cue sheets for UC Funnel participants this past year, including "CONSER = Cooperation," "Maintaining CONSER Records," and "Modifying Pre-AACR2 Records."
      4) Plans: MMB plans to develop an FAQ for the Web site.
      5) Comments: The participants thanked Melissa for the excellent work she has done.
   b. Renee (Communications Coordinator)
      1) Background: Over the past two years, we have experimented with several methods of communication, including a discussion listserv, a Web site, and a blog. Originally, we had anticipated the use of the discussion listserv for collaboration, but have been baffled by the silence. So, with the two-year anniversary, it was time to find out how participants viewed Funnel communication. Renee developed a short SurveyMonkey survey and announced it through the UC Funnel discussion listserv; 24 Funnel surveys were returned (21 of which were complete) from: UCD, UCI, UCLA, UCSB, and UCSD.
      2) Conclusions: Most participants prefer to use the Web site, individual email, and the discussion listserv. The Funnel Web site documentation is in high demand. The discussion listserv is viewed as a useful way to share information about cataloging policies. But most catalogers turn to local resources first for daily needs.
      3) Recommendations: The survey results support increased use of conference calls for discussion. The group should consider annual meetings that would include training. Renee will pursue the idea of using volunteers to host discussion topics in the future, to increase the usefulness of the UC CONSER Funnel listserv. She will also pursue the development of FAQs for the Web site.
      4) Comments: All of the conference call participants commended Renee on the survey. Adolfo noted that campuses have different levels of involvement in the Funnel; that's fine. A one-day structured meeting would offer an opportunity for an update session and a face-to-face policy discussion. Peter supported the recommendation of an in-person meeting and suggested that mini-presentations on topics such as reviewing work would be useful.

3. CONSER Standard Record implementation: In general, the CONSER Standard Record is working. However, added examples are needed to illustrate practices for maintenance, especially for mixed practice.