

Participating: Adolfo Tarango, Renee Chin, Carole McEwan, Sarah Gardner, Valerie Bross

1. Round-robin: News from campuses
  - a. UCSD: Working with UCSB & Berkeley. UCSB sending a few items for review each month. UC Berkeley sent a batch 3 weeks ago; should be sending another batch this week. The goal/limit is to send 5-10 titles/week.
  - b. Davis: Completed a reclamation project on Friday that resulted in loading 36 files of mono & serial records. Goal: To get OCLC numbers in the local Davis ILS records. // Sarah will be training another cataloger in her unit to do CONSER work. With the new addition, Davis will have 5 CONSER catalogers (including Sarah). Congratulations, Sarah! // Sarah volunteered to work with UC Riverside on review, but that has not gotten underway yet. Sarah Gardner & Melissa Beck have been trying to contact Sharon Scott. \*Action Item: vb to also send message to SS\*
  - c. UC Irvine: Nothing new to report—continuing to catalog.
  - d. UCLA: Preparing for Cal Docs Project to begin Sept. 2<sup>nd</sup>. Questions remain.
2. Cal Docs Project: Original cataloging from UC Berkeley, UC Davis, UC Irvine, UCLA, UCSD\*
  - a. Adolfo: Just sent a report to CAMCIG; intend to complete one more test of harvesting. UCSD intends to send the Cal Docs in one file per month. If the project begins Sept 2<sup>nd</sup> (as proposed), then the first batch of harvested Cal Docs would probably go out Sept.8<sup>th</sup> or the Monday after that.
    - Harvesting: Monographs (including those originally cataloged by the UCs) would be pulled in through the harvesting technique.  
\*Action: Campuses should review these records and send comments to Adolfo. Watch for: duplicate records, bad links, ugly cataloging. SCP Caldocs records can be identified by the presence of “cadocs” in 599 \$b or by searching the 793 title hooks: Open access resource; selected by the UC Libraries. \$p CalDocs online journals (...online monographs or ...online databases)..\*
    - Reporting: Continuing resources won't be included through harvesting. Instead, all serials and e-IRs should be reported to Renee Chin as we usually do. Campuses may notify Renee of ALL Cal Docs continuing resources with 856s—do not need to limit reporting to the agencies on the list.
    - Expectations:
      - Level of cataloging: Those campuses wishing to follow what UCSD has already been doing should know that UCSD has been doing full-level cataloging (ELvl I or ELvl blank) for Cal Docs.
      - Classification: UCSD has not required LC classification, but has entered 086 Cal Docs numbers, either authenticated or locally-assigned in 099 field. (vb comment: Bill Riddle at the State Library has offered to create authenticated 086s for UC catalogers who ask. His email address is: [briddle@library.ca.gov](mailto:briddle@library.ca.gov))
  - b. Archiving: UC Davis has stopped adding files to ContentDM due to problems. (UCSD: Donal experimented with DALs, but never added files to ContentDM.) Carole suggested getting in touch with Nick Robinson; he has been using the software for the past year.  
\*Action: vb to contact Kris K, to contact Nick; arrange telephone call with Sarah Gardner & Nick, to find out what UC Berkeley's experience has been. \*  
\*Action: Next step: if this can be resolved, get back in touch with Bill Riddle to find out whether the State Library has approved use of the State Library account for UC Irvine & UCLA.\*  
\*Action: Adolfo to talk to Linda about status of CAMCIG discussions\*

### 3. UC CONSER Funnel Meeting

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\* See also follow-up notes at end

- a. Background: During the last conference call, Adolfo suggested bringing everyone together. Carole McEwan has offered to host the event at UC Irvine.
- b. Discussion: In light of budget problems, the justification for holding such an event should be very strong, concrete.
  - Timing: (note: CONSER is Apr. 30-May 1, 2009.) UC CONSER Funnel meeting should be end of February though March, 2009.
  - Agenda:
    - Have already identified some possible activities: speaker on WorldCat Local; workshop (integrating resources?); unconference on uc-wide cataloging issues;
    - Additional: training review; archiving (through LOCKSS, ContentDM, CDL); OCLC Reclamation: Who has done it? What advice to the rest of us?
  - Participation: Would like to include all who are participating in cooperative CONSER cataloging.  
\*Action: Carole McEwan will send a message through the Funnel listserv to assess interest\*
  - Local arrangements:  
\*Action: Carole McEwan will find out about arranging for a room\*
  - Funding:  
\*Action: Valerie Bross will find out whether/how to apply for a minigrant. Could we have a face to face for those who can meet AND fund a webinar for at least some agenda items?\*

#### 4. Expanding the UC CONSER Funnel

- a. Background: Following the persuasive presentation that Sarah Gardner developed for NASIG, several non-UC catalogers have expressed interest in the UC CONSER Funnel for various reasons
  - Bill Riddle at California State Library: would be willing to create BibPURLs for California Docs, if he had the authorization.
  - Julie Su at CSU SD: Would like to join the UC CONSER Funnel for support in doing CONSER work. Currently participates in CONSER for the publication patterns & for special projects (e.g., record enhancement to add LCSH for records with MeSH)
  - Brian Provencale at Stanford:
  - Getty catalogers: Have applied for associate membership in CONSER; may be interested in belonging to the discussion group, having support
- b. Discussion: This is definitely something that will need to go through CAMCIG. The success of the program has engendered interest in the Funnel beyond the UCs. This is a compliment to Pat French's idea. But it also calls for serious consideration. Three models to consider:
  - Extend UC CONSER Funnel services to other institutions as affiliates. For this model, we would chip in as with other UCs. Goal: To become self-reliant at whatever level is appropriate.
  - Foster parallel Funnel for CSU: If enough interest, help start a parallel funnel among the CSUs.
  - Expand scope to California CONSER Funnel: This would take the CONSER funnel outside of the UC framework

Beyond expansion to groups, the Funnel should also consider expansion by individual CONSER members (following the model developed for Gene Dickerson). This could provide more reviewers for the funnel.
- c. Actions:
  - Adolfo: Will broach this with Linda
  - vb: will contact Julie Su & ask her to poll her colleagues within the CSUs for interest. If CSU SD is the main campus interested, then the first model might be more realistic; if others, then the parallel funnel might be more effective.
  - vb: will send a draft proposal to the Liaisons group for comment

## Follow-up to Meeting

There are two CalDoc proposals being considered. Proposal one, the SCP proposal, deals with SCP harvesting the OCLC database for new and updated CalDoc records. Proposal two, the UCB proposal, calls for the campuses to catalog CalDocs. The UCB proposal doesn't involve SCP, however, the [monographic] records the campuses would be creating or updating would be picked up by the harvesting done by SCP in proposal one.

The suggested implementation date of Sept. 2nd is for the UCB proposal. Checking with Linda, this has gone to CAMCIG but so far no one has commented one way or another on moving forward on Sept. 2nd. If you need more info on this, she suggests asking your CAMCIG representative. SCP will stand ready to advise campus staff in their development of local procedures and practices.

Regarding the SCP proposal, Donal and I did an analysis of the harvest of the "July" records. Based on this analysis, we prepared a report for CAMCIG which has been forward to them and should be discussed at their September meeting (Sept. 8). Our basic conclusion was that this harvest would "work" for monographs but not serials. For the monographs we therefore recommended employing this procedure. For the serials, we presented two options for how serials might be handle separately, that SCP manually review the harvested serials or that the serials be reported to SCP as is currently done by Funnel participants when they update any SCP distributed serials. We recommend the second option. We also suggested we do one more analysis, on the "August" file, and if the results were still favorable, Linda would then discuss with Ivy about SCP taking on this work. Assuming Ivy agreed, we would then begin sending out records on a monthly basis. As such, there is no fixed implementation date for the SCP proposal.

I hope the above clarifies where we are with the CalDoc proposals, and I think the minutes should reflect the above corrections. My apologizes for any confusion I caused by mixing dates and proposals.

Regarding expansion of the Funnel. Linda recommends us detailing our various scenarios and then submitting them to CAMCIG with well thought out pros and cons of each. She isn't sure how CAMCIG will receive this, but is pretty sure they will want to deliberate thoroughly the options. Of key importance is some indication of the level of expected impact on our resources, what kind of commitment would we be promising/required to make.

I also asked Linda about support for a face-to-face meeting and she confirmed that in our current environment we would need a very strong program for upper level administrators to support it, even for us at UCSD who would presumably have little overhead if we met at Irvine. For her part, she would want to see a very well developed agenda on issues that could not be handle via e-mail or conference calls.

Adolfo