

Heads of Special Collections -- HOSC

Conference Call

July 9, 2012, 10:00 a.m.-12:00 p.m.

Attending: Christine Bunting (Santa Cruz), Lynda Claassen (San Diego), Polina Ilieva (San Francisco), Tom Hyry (Los Angeles), Michelle Light (Irvine), Emily Lin (Merced), Daryl Morrison (Davis; Chair), David Seubert (Santa Barbara), Adrian Turner (CDL)

Invitee: Kelley Bachli, Head of Collection Management, UCLA Library Special Collections, member of POT 3, lightning team 2

Minutes

--Aeon update (Adrian Turner and David Seubert)

David Seubert reported that the Aeon planning meeting took place with David, Adrian, Melissa, Tom and several others from UCLA. Emily and Polina tried to attend remotely, but there were difficulties with Skype. David and Adrian have an outline of a proposal document, developed during the planning meeting, which they will develop in the next few weeks. **Action:** Adrian will pursue some follow up questions with Christian DuPont regarding the Interlibrary Loan system functionality and interface and a more generous discount estimate for a consortia. A discussion followed as to where to present HOSC's proposal for a systemwide use of Aeon should be sent. It was proposed that we send a letter to the CDC chair as well as the Council of University Librarians.

--POT 3 Lightning Team 1 Archivist Toolkit recommendations (Adrian Turner)

Adrian reviewed the Archivist Toolkit recommendations to facilitate systemwide use of Archivist Toolkit, by creating a users' group that will provide guidance and implementation assistance, and providing a "train the trainers" series of workshops. Discussion followed with comments that the three-day workshops may be longer than needed and a heavy use of staff time. There were questions as to how to address legacy data issues that pre-date Archivist Toolkit and EAD. Tom Hyry mentioned that UCLA has some 900 finding aids that will need to be converted this would take years.

It will be up to each campus to migrate legacy data from other systems into the Archivists' Toolkit; the software supports batch importing of legacy data in particular formats (e.g., tab-delimited, EAD), and it's a relatively straightforward process to get that data in -- but legacy data in other formats may require analysis, a good understanding of the local data, decisions as to what to carry forward (vs. what to leave behind), etc. Legacy finding aids in non-EAD format would also fall into this category. Adrian commented that the Users' Group could provide strategies and solutions towards helping individual campuses with data migration considerations.

Michelle Light commented that UC Irvine has been migrating legacy data over a number of years; EAD data and the conversion was seen as easy (also, the process of migrating from a local AT instance to CDL-hosted instance was relatively straightforward). Archivist Toolkit and Archon will soon merge into Archives Space. Discussion that the ArchivesSpace developers are committed to supporting users with migrating Archivist Toolkit instances to ArchivesSpace .

Action: Adrian Turner will add comments to the report based on the discussion, and will finalize the report for delivery to the NGTS Management Team. Summary of key changes: 1) characterize resources needed and considerations surrounding migrating legacy data into Archivists' Toolkit, 2) provide a draft charge for the UC Archivists' Toolkit User Group; 3) training

could be refactored to 2 days; and 3) the Use Group should report to HOSC (not CAMCIG). Daryl Morrison as chair will provide an endorsement letter from HOSC.

--Draft Guidelines for Efficient Archival Processing in the UC Guidelines for Efficient Archival Processing. POT3 Lightning Team 2. (Michelle Light). Minutes of the discussion were taken by Kelley Bachli and excerpted here.

There were comments that the lightning team had done a good job and that the guidelines looked good, were thorough and set the right tone. Most of the discussion related to the impact of efficient processing on the public services staff and reading room access. Many researchers try to access collections remotely and want the staff to do the work. UCSD has referred researchers to paid graduate students.

There was a suggestion to add case studies about public service access. Tom suggested that the American Heritage Center might have public service policies relating to efficiently processed collections. Issues relating to privacy and security risks were mentioned. Michelle Light commented that the lightning team had discussed "reviewing materials on demand" and the impact on the reading room staff.

The priority to make collections accessible with even a record level description, box lists, and other strategies were seen as very positive. Michelle Light indicated a follow-up Lightning Team will look at the resources needed to make backlogs available. There was discussion about the possibility of grant applications to CLIR. There may be some negative response to the word "minimum," although the committee had been back and forth about the word "minimum" or "basic." Michelle indicated that the committee would review the wording again. A Lightning Team 2B is reviewing processing metrics. Their recommendations will be added to the Guidelines.

Christine suggested that a "born digital content" section be added. Suggestions on where the manual should be posted included the HOSC website and a wiki hosted at UC SF. There was discussion as to whether the wiki would be accessible beyond the UC campuses.

Actions:

Michelle Light will look into policies regarding public access to minimally processed collections. Michelle will follow up on how many institutions would be interested in collaborating on a grant survey project.

Text on born digital content will be added to the Guidelines.

HOSC will be asked to implement the Guidelines. When the processing metric system is established, HOSC will be asked to start tracking processing rates.

Michelle will request space on UCSF Wiki and will investigate the permissions.

--Next meeting (Monday, October 8, 2012 10:00 a.m.)