HOTS Conference Call
December 8, 2008, 2:00 – 4:00

Participants: Lee Leighton (Chair, UCB), Martha Hruska (UCSD), Mary Page (UCD), Jim Dooley (UCM), Anneliese Taylor (recorder, UCSF), Vicki Grahame (UCI), Lisa Rowlison de Ortiz (LAUC rep), John Riemer (UCLA), Manuel Urrizola (UCR), Patti Martin (CDL), Lai-Ying Hsiung (UCSC), Brad Eden (UCSB)

1. Announcements

Bruce at UCM forwarded the message to Merced librarians about the UL decision to go forward with NGM, and entering pre-production. Campuses should expect to see the announcement shortly as it works its way through the distribution chain.

The SCP sub-group (Martha, Adolfo, Jim, Linda, John) is continuing to work on SCP budget and workflow and governance issues. A future agenda item for the January call is the document this group is working on, "What's New about the New SCP". It describes what the new SCP will look like and what will be required from technical services to make some of the proposed changes happen. It will be ready to share via email later this week.

The SCP scope statement that we discussed at the in-person meeting was sent to SOPAG, but the statement has not gone to ACG's for comments. Lorelei would like SOPAG to first think about SCP in context of these new, proposed Next Gen Technical Services.

Patti – wants to make sure that NGM, SCP and NGTS are working towards a common set of goals.

ALA Midwinter is late January, so we'll have the next conference call before that, on January 12 (tentative). Attending Midwinter: Lee, Martha, Lai-Ying, Jim, John

Next call – answers to questions sent to ACIG.

Campus budgets were discussed.

2. Next Generation Tech Services (NGTS)

(John) A group is being formed following the December SOPAG meeting - a steering team consisting of 3-5 people, reporting to an exec team, consisting of several ULS and the chair of steering committee. It will be very similar in structure to the NGM Imp Team. It will use campus consultants knowledgeable in certain areas and may assemble smaller groups as needed. The steering group will coordinate with HOTS, CAMCIG, NGM and other groups. Will use HOTS expertise extensively for this group. The SOPAG discussion paper was shared with HOTS; it is the lead document to go out as part of charge for new group. Charge due by January.

How to define NG Tech Services – moving operations to the network level. What that means: working towards the implementation of the backend functions that support NGM; coordinated acquisitions and collection development – UC-wide; moving beyond MARC formats; tapping into technical expertise; using one vendor for acquisitions. ARL is launching a nation-wide effort of cataloging and collection development at network level.

Timeline – one year. Goal – go for "low-hanging fruit" to meet goals of BSTF.

Distributed expertise document on HOTS site - LAUC discussed putting the expertise document on LAUC site. This means the document needs to be maintained for currency.

NG Tech services – HOTS expertise will continue to be needed. The budget situation will be a significant driver. Bib groups – coordinate to make sure some materials are being purchased by one campus. A call was sent from CDC to bib groups for Prospective Shared Print proposals in targeted subject areas to do coordinated collecting.

ARL standings have traditionally been based on collection size. Brian Schottlaender commented at LAUC that individual holdings impact ARL standing. There needs to be a change in the model for rankings, based on the trend of collective collections. If all UCs could use the others' collections though we'd always be top ranked. That doesn't sit well with other members. The new ARL index is total expenditures, not number of volumes. This is starting to be looked at more. Counting volumes and number of serials is too difficult to discern.

Serials Solutions as ERMS status – campuses can purchase individually through pricing obtained through CDL. Where does ERM fit in with NG tech services?

Feelings about NGTS from the group: members are anticipating which parts of NGTS will work. What savings will we see from work done at network level. It could address special collections that are not shareable, since cooperation could help campuses spend more time on special collections processing. OCLC permissions – CAMCIG is discussing training and the movement toward more cooperative cataloging. OCLC has plans – beginning February all authorized users with full-level cataloging authorizations will be able to modify records (except CONSER).

Concern about protecting TS staff positions at some campuses. Perhaps shift the work to other types of work (e.g. digital and special collections). Can address backlogs of other material. Movement toward digitization – jobs and responsibilities are transforming. Training can be offered. Less new material is coming through since there's less budget for physical collections. Share experiences amongst campuses. Coordinating where there are special collection themes – different pieces at different campuses (Californiana). Need for metadata other than MARC.

System-wide investments in tools like WorldCat Selection could save money in the long run. The idea that you have to put forth some funds, like with SCP, in order to save money and cut overhead.

NGM anticipated needs:
- New release of WCL requires testing by circulation liaisons
- Request release in March – resource sharing liaisons will be involved
- Substantial testing after feature changes and closer to implementation
- Policy decisions for RLF holdings symbols needing HOTS input

Next implementation team meeting is this week at Berkeley.

Questions: do we need campus views? What about affiliate libraries? Do RLF holdings get included with campus results? There are still many questions and much work to be done. We need awareness of the amount of work to be done, and the overlap of work between NGM and NGTS and overloading those doing both.

NGM Task Groups from initial pilot project – some still need to exist. Some new ones, however they won't be completely UC-populated. Post-production – need to dedicate human resources there as well to keep it running. Some resources relieved at CDL and campuses once classic Melvyl goes away. Clarification: at CDL we think that there will not be a huge net gain in resources, since WCL will need a lot of care and feeding. And certainly while WCL and Melvyl are both operational, overhead for both CDL and the campuses is doubled.

3. General Discussion on OCLC Local Holdings Records (LHR)

What will be required to get LHRs from campuses into WCL? It's a separate type of load to OCLC. LHR record loads provide the bib number that the records go with. UCLA sent LHRs to OCLC – can send a batch the first time, and revisions monthly thereafter. OCLC has agreed it needs to industrialize the record load process and be capable of receiving large quantities on a daily basis.

What is the benefit of LHRs? Good for multi-volume titles. It would also pre-harvest holdings data for serials. Only circulation information would need to be fetched in WCL, resulting in significant performance improvements for end users. If we use LHR to get local info, OCLC needs to make changes as well: to make WCL interact with LHRs, and to allow frequent updates. Timeline for LHRs would be later than implementation date for WCL. If you make an update to one LHR for a record with multiple, currently have to re-send all LHRs.

John doesn't advise creating lots of LHRs now, because technical specs haven't been decided yet. A group from UC including John, Linda Barnhart, and Sara Layne discussed fields from bib records with OCLC. There are some outstanding questions. LHR contains: campus-specific URL, e-holdings, exact location, call #, access points specific to item (793 field).

Implementation Team owes campuses guidance on what needs to be done to move forward for tech services.