

CDL Feedback on BSTF Report

March 30, 2006

The California Digital Library gathered feedback on the BSTF Report in a variety of venues. First, the CDL held an open staff meeting March 16th to talk about the BSTF report. Amy Kautzman provided a presentation on issues surrounding bibliographic services and led the group through discussions and ranking of the reports recommendations. The open staff meeting was then followed up by more in-depth discussions in three of CDL's functional groups: services group; technology group; and the content group. The following is the results of the feedback process:

- Part 1: CDL Input via all staff meeting
- Part 2: Input from CDL's Services Group
- Part 3: Input from CDL's Content Group
- Part 4: Input from CDL's Technology Group

Part 1: CDL input via all staff meeting

Approximately 40 CDL staff member attended a two hour session on the BSTF Report. The participants were provided with a form to provide input into the Report and 27 forms were completed.

1. QUESTION:

Which 3-5 of these 15 major headings do you think are the most important for UC to address?

The topped ranked recommendations are as follows:

1. I.1 Provide users with direct access to item (14 votes)
2. I.5 Offer better navigation of large sets of search results (15 votes)
3. II.1 Create a single catalog interface for of UC (14 votes)
4. III.1 Rearchitect cataloging workflow (12 votes)
5. III.4 Automate metadata creation (20 votes)

The runners-up are:

1. I.4 Offer alternative actions for failed or suspect searches (7 votes)
2. I.6 Deliver bibliographic services where the users are (10 votes)
3. I.7 Provide relevance ranking and leverage full-text (10 votes)
4. III.1 Support searching across the entire bibliographic information space (9 votes)

2. Section II.1 recommends creating a single public catalog interface for all of UC while recognizing that more debate and discussion is needed to identify the best option for that single interface.

QUESTION:

If a decision is made to pursue this recommendation, which of the two options that the Task Force analyzed would you recommend, and why?

- Creating a single UC OPAC system (18 votes)
- Outsourcing the UC OPAC (to OCLC, RedLightGreen, Google, etc) (4 votes)

Comments:

- Pursue whichever looks most promising after a formal analysis of costs and benefits.
- I guess I have to vote for this (create single OPAC), but I would argue for a combination of these... could there be campuses that host specific subjects?
- Outsourcing would give us less control.

3. Section III.1 recommends re-architecting cataloging workflow to view UC cataloging as a single enterprise while recognizing that more debate and discussion is needed to identify the appropriate mechanism for implementing such a single enterprise vision.

QUESTION:

If a decision is made to pursue this recommendation, which of the three organization options that the Task Force analyzed would you recommend, and why?

- Coordinate cataloging expertise and practice across the entire system. (13 votes)
- Comments:
- Why? Each campus should always be responsible for its own records.
 - UC's needs are unique enough that creating our own system would probably work better.
- Consolidate cataloging into one or two centers within UC (6 votes)
 - Outsource a greater proportion of standard cataloging work (3 votes)

Comments:

- Pursue whichever looks most promising after a formal analysis.

QUESTION:

If a decision is made to pursue this recommendation, which of the three architecture options that the Task Force analyzed would you recommend and why?

- Create a shared central file with a single copy of each bibliographic record. (16 votes)
- Adopt a single ILS for the entire University of California System (5 votes)
- Rely on OCLC as the single UC database of record for bibliographic data (2 votes)

Comments:

- Pursue whichever looks most promising after a formal analysis.

QUESTION:

If you agree that we should pursue the recommendation to implement a single cataloging enterprise, are there other architecture options we should consider?

1. --Probably – but I don't know what. We should avoid OCLC – they are very uncooperative and unreliable.
2. --Consider a lower-cost, less catalog-like central index (replacing the union catalog) that would serve a single user interface to all local catalogs.
3. --Don't necessarily agree with this.
4. --XML-based data systems
5. --Explore whether Common Framework architecture and a harvested metadata-only approach might be an ideal way to implement a cross-UC, cross-collection, cross-format interface – separate access system from variety of content mgmt systems.

QUESTION:

If you disagree that we should pursue the recommendation, what alternative action would you recommend?

1. N/A
2. Status quo.
3. Continuation of above (3 & 4) – by “cataloging enterprise” are you only talking about MARC cataloging? Seems like thinking about a “single cataloging enterprise” when you think outside the MARC box is not always a very realistic option.

QUESTION:

Are there any other comments or suggestions you have with regard to the next steps that should be taken in following up on the recommendations of the report?

1. Make simple changes, such as changing UC-eLinks default behavior immediately so then make other changes as quickly as possible. It would be great to start this year.
2. I think it might be worthwhile to get an outside consultant to facilitate the process of making decisions and getting buy-in across UC. It's going to be a tough row to hoe! Also, just because CDL is busy doesn't mean we wouldn't want to build a new system!
3. Summarization of the comments and feedback would be really interesting to see.
4. Build a Melvyl replacement incrementally to test concepts and demonstrate feasibility.
5. From some of the comments we've seen in CDL focus group reports, the addition of enriched content such as Tables of Content, cover art, publisher promotional blurbs, etc. would be greatly appreciated by UC patrons.
6. Figure out a way to scope a prototype, harvested metadata-only, Common Framework-based project to integrate metadata from Melvyl, OAC, and a couple campus-based content systems, so we can get a better understanding of all the metadata and access issues that this laudable integrated vision raises.
7. View UC bibliographic access as a single enterprise. This is not simply a rephrase of II.1 and II.2; it is the people/money infrastructure that would allow implementations of II.1 and II.2 to be effective and efficient. Having the appropriate organizational infrastructure to ensure effective deployment and continuous improvement, determining a more visible way to understand shared costs for bibliographic access and developing a more direct cost-sharing model will reduce costs and will better ensure that systems meet both campus and patron needs. The decision to move UC Libraries to "One University, One Library, One OPAC" will definitely fail if the cost-sharing and institutional organization isn't well-considered.

QUESTION:

Is there anything else you think UC should be doing in pursuit of improving bibliographic services?

1. --Seems like some of these ideas are such “no brainers” that we might want to consider what it would take to make shorter-term improvements to Melvyl.
2. --I haven't read the report as carefully as I should yes, but it seems like there's room for systems that learn and respond more to users' actions. Ranking relevance in part by most frequently checked-out/viewed items.
3. --Campuses need to provide more instruction on how UC-eLinks works. As it is now, many patrons simply click on the first link on the UC-eLinks menu and always assume that this means there is full text available; often this in not the case.
4. --Integrating with CMS (Sakai, BB) is critical... the first click where we lose patrons is the click to a library's homepage. If we can push our resources out, then we need to provide good support and services for pushing the right resources out, course by course.
5. --SF Public Library OPAC allows you to browse other items that would be on the shelf with the item you're looking at.
6. In Appendix F, the 8th additional idea considered is to partner with faculty to do an economic analysis of the value of metadata. I like this idea and would consider expanding it to non-IS faculty (economics faculty, management faculty in business schools, etc.) to perform the cost-benefit analysis and provide consulting on organizational infrastructure.

Part 2: Input from CDL's Services Group

Most significant recommendations:

- (II.2) Search across entire information landscape but must be accompanied by (I. 5, I.7, II.2.b) mechanisms for better navigation of large results sets
 - Another strategy is to expose our content to other search environments (I.b.c). Realistically, we probably need to do both.
- (I.6) Deliver services where users are: Integration with Sakai is on the horizon but will it reinvent wheels already used by libraries (OpenURL, metasearch)? We should actively strengthen our connections with this community. Other approaches worth investigating as more lightweight solutions include the Univ. of Minnesota's use of blogs to connect to licensed resources, encourage creativity of subject librarians
- (II.1) Single OPAC: Users already work with WorldCat, Melvyl and local catalogs. Try starting with the largest catalog scoped to the narrowest access (local collection which users value), but make it easy to "drop the walls" to expose regional and national collections.

Experimentation:

It is imperative to focus on some low hanging fruit that has impact or else we risk losing another generation of students. We encourage experimentation with the following:

- (III.4.e) Enrich catalogs with additional content: Potentially one of the easiest to implement with great immediate impact to users. It should be possible to provide a direct link from Melvyl to Amazon or similar services. Or using a service to add content (e.g., Syndetic Solutions) would also provide immediate value. We encourage active experiments in this area because *users are already using library catalogs and Amazon side by side*. Consider using existing catalogs with some of these features (e.g., Libraries Australia from National Library of Australia <http://librariesaustralia.nla.gov.au/apps/kss>) to evaluate what is important to users.
- (I.1) Provide direct access to the item: Some of the barriers/excess clicks will go away (the copyright screen in Melvyl once the upgrade is complete) and others could be dropped in UC-eLinks, but it will not be perfect. Need experimentation to see what is tolerable and "good enough". In Melvyl, revisit the capability to limit to online resources (full text, not just those with tables of contents)
- (I.3) Personalization/customization: Experiment with using search boxes containing parameters to search subsets of Melvyl, using the "collections" function or other scoping. These can be placed in context on course pages, instructional pages, etc.

Part 3: Input from CDL's Content Group

General Comments:

- The BSTF Report mixes the need to manage collections (e.g. Melvyl as an inventory) and process materials with the need to provide improved access to collections whether analog or digital. It is difficult to prioritize functions when the Report alludes to a single solution for both content management and access.
- It is imperative that digital content that is located in systems such as the Online Archive of California, Calisphere, Counting California, e-Scholarship Editions, eScholarship Repository is integrated with a broader solution. The content must be easy to find and manipulate.
- There needs to be an integration of workflow and processing to make collaboration possible.
- There is a tremendous amount of metadata available and we need to develop ways to exploit metadata that will help users gain access to content. For example, Onix provides ToCs, indexes, bibliographies, reviews, cover matter that could be incorporated into the record for improved discovery.
- It is important to look beyond MARC for other metadata schemas that will provide improved access to a range of content types: videos, numeric datasets, images, sound recordings, etc.

- The range of content types also demand the ability for users to discover, view, and manipulate different types of content in different ways (for example a user using numeric data will have different needs than an a user searching for images.) Perhaps a model of “search together, use uniquely” is appropriate.
- Creating metadata is expensive -- let’s automate metadata production where possible.
- There needs to be an improved collection level descriptions.

Part 4: Input from CDL’s Technology Group

Section I

1. QUESTION: Which 3-5 of these 15 major headings do you think are the most important for UC to address?

- I6 – Deliver bibliographic services where the users are – 4 votes
- I7 – Provide relevance ranking and leverage full text – 4 votes
- I 1 – Provide users with direct access to item – 1 vote
- I8 – Provide better searching for non-roman materials – 1 vote
- IVa – Support continuous improvement – 4 votes

Section II.1 recommends creating a single public catalog interface for all of UC while recognizing that more debate and discussion is needed to identify the best option for that single interface.

QUESTION:

If a decision is made to pursue this recommendation, which of the two options that the Task Force analyzed would you recommend, and why?

- II1 – Create a single catalog interface for all of UC – 6 votes

Section III.1 recommends re-architecting cataloging workflow to view UC cataloging as a single enterprise while recognizing that more debate and discussion is needed to identify the appropriate mechanism for implementing such a single enterprise vision.

QUESTION:

If a decision is made to pursue this recommendation, which of the three organization options that the Task Force analyzed would you recommend, and why?

- III1 – Rearchitect cataloging workflow - 3
- III2 - Select the appropriate metadata schema – 3
- III3 – Manually enrich metadata in important areas – 1

Comments:

- I3 – “Do not do this” – 4 people
- II1 – Create a single *interface* for all of UC
- III2 – Create work records to support FRBR
- III4 – “I worry about the quantity and quality across all sources”
- III4 – “Need to divide our collections for this. It will work for some and not others. I don’t think continuous improvement will work too well.
- III4 – Change to the title to “Automate Metadata Creation, Extraction and Aggregation”