

March 16, 2007

To: Bernie Hurley, Chair, SOPAG

From: Lee Leighton, AUL Technical Services, Berkeley

The Berkeley campus responses to the Bibliographic Services Task Force report are inserted among the questions below. The campuswide library staff meeting that discussed the report did not address all the points below because of time constraints and the size of the group. Those are noted as well.

1. The recommendations of the report are organized into four sections:
 - I. Enhancing Search and Retrieval;
 - II. Rearchitecting the OPAC;
 - III. Adopting New Cataloging Practices
 - IV. Supporting Continuous Improvement.

There are a total of 15 major headings under the four sections (I1 – I8; II1 – II2; III1 – III4; IV). While we recognize that many of these items are interdependent, that is, some must precede or accompany others, we ask that you try to comment on them without considering dependencies at this point. Which 3-5 of these 15 major headings do you think are the most important for UC to address?

The 5 major headings chosen by the Berkeley staff meeting, as the most important for UC to address are listed below in order of preference

I.1 Provide users with direct access to item

II.1 Create a single catalog interface for all of UC

III.1 Rearchitect cataloging workflow

I.5 Offer better navigation of large sets of search results

I.4 Offer alternative actions for failed or suspect searches

2. For each of the 3-5 major headings selected above:

- Which of the sub-recommendations do you think should be given the highest priority; that is, which do you think UC should address first and why?

I.1a: Have UC eLinks take you to a logical, default choice, with option to go back to the menu if you want a different option. (If there is a reliable full-text link that would be first choice.) WHY? Currently users must go through too many links to find the full text. The current implementation is very confusing and time consuming for users.

II.1a: Create a single catalog interface for both local and system wide collections. WHY? This is the only subcategory under this heading.

III.1b: Implement a single data store for UC, be it a single file of cataloging records or the entire ILS.

I.5a: Implement FRBR concepts to present related works hierarchically, followed closely by...

I.5b: Follow all of the linking fields in serial records to present all of the variant titles to users in a "family tree." WHY? We think both options are "highest priority". Implementing both would have a huge beneficial public service impact.

I.4a: Assess a user's input for likely spelling errors and offer alternatives, particularly if a term has few or no hits. Extend the services offered by general English-language systems such as Google to reflect the greater complexity of scholarly inquiry, including multi-lingual spell-checking and sensitivity to abstruse scholarly terms.

- Are there any recommendations that you think should be added? Why?

None came forward in the discussion

- Are there any recommendations that you think should NOT be pursued? Why not?

Not really, III.2c (consider...abandoning the use of controlled vocabularies...) was debated. However, it's not clear that this metadata may not be useful in future ranking and recommendation services. More research is needed before this is adopted.

3. 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.

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
- Outsourcing the UC OPAC (to OCLC, RedLightGreen, Google, etc)

If you agree that we should pursue the recommendation to create a single point of entry for our users, are there other options we should consider? If you disagree that we should pursue the recommendation, what alternative action would you recommend?

Berkeley recommends creating a single UC OPAC system. WHY? We've had less than ideal customer service from some of the commercial systems mentioned. In the perfect world, we would also recommend using a single ILS for the entire UC system, as it makes sense to use an OPAC that is an integral part of the ILS. However, it's very possible the current ILS vendors will not be able to give us the type of OPAC envisioned by the BSTF report. In this case, we would recommend a single OPAC for UC that coordinated with campus systems for circulation, cataloging, acquisition and

serials control, where the campus systems all came from the same ILS vendor.

4. 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.

a. 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.
- Consolidate cataloging into one or two centers within UC.
- Outsource a greater proportion of standard cataloging work.

If you agree that we should pursue the recommendation to implement a single cataloging enterprise, are there other organization options we should consider? If you disagree that we should pursue the recommendation, what alternative action would you recommend?

Berkeley recommends both outsourcing a greater proportion of standard cataloging work, whenever possible and then, coordinating cataloging expertise and practice for the more specialized materials across the entire system. WHY? Outsourcing the more standard cataloging work could free staff time for materials requiring special expertise. If expertise were coordinated across the entire system, we would not need to duplicate staff efforts at every campus.

b. 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.
- Adopt a single ILS for the entire University of California system.
- Rely on OCLC as the single UC database of record for bibliographic data.

Berkeley doesn't see these three options as mutually exclusive. In the perfect world, we recommend adopt a single ILS for the entire University of California system which has a single copy of each bibliographic record with holdings for each campus - see answer to number 3. (For the users, it would be a shared central file, whether the architecture of the ILS was actually a single shared file or not.)

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

Berkeley recommends separate "portals" for each campus. The ILS should allow local (i.e., campus level) holdings maintenance, acquisitions, auto-circ, reserves, reporting capabilities, etc. Make it a truly shared enterprise instead of following the model of separate campus ILS-s which the central system would need to feed records into and query for current circ status, etc.

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

5. 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?

There really aren't many of these recommendations that we can fully pursue with our current bibliographic systems. We thought that there may be a tension between moving forward incrementally vs. more boldly (i.e., more starting from scratch). It may be that we move boldly, or not much at all.

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

Not at this time, the BSTF report already opens many avenues to explore