

UCSF held one open meeting for all library employees on Tuesday, March 14th. This summary serves as both the library and LAUC response for UCSF. At that meeting, Amy Kautzman (by speaker phone) gave an overview of bibliographic services and also showed examples of systems that did some of the recommendations in the report.

After the general overview, the group discussed the report and the attendees voted on the 3-5 items they thought were most important. After voting was completed, the top ranked recommendations were discussed in more detail. Unfortunately we ran out of time, so we weren't able to devote very much time to the last 3 questions.

QUESTION:

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

The top ranked recommendations are as follows:

1. I.1 Provide users with direct access to item (13 votes)
2. II.2. Support searching across the entire bibliographic information space (13 votes)
3. II.1 Create a single catalog interface for all of UC (9 votes)
4. III.1 Rearchitect cataloging workflow (9 votes)
5. IV: Supporting Continuous Improvement (8 votes)
6. I.7 Provide relevance ranking and leverage full-text (7 votes)

Because I have the numbers, I thought it would be interesting to show how the other recommendations were ranked.

7. III.4 Automate Metadata Creation (6 votes)
8. I.3 Support customization/personalization (5 votes)
9. I.6 Deliver bibliographic services where the users are (5 votes)
10. I.2 Provide recommender features (3 votes)
11. I.4 Offer alternative actions for failed or suspect searches (2 votes)
12. I.5 Offer better navigation of large sets of search results (2 votes)
13. III.2. Select the appropriate metadata scheme. (2 votes)
14. I.8 Provide better searching for non-Roman materials (1 vote)
15. III.3 Manually enrich metadata in important areas (0 votes)

Some general comments:

- It was difficult to rank the recommendations in Section I because many of them seem related, and they were much more granular than the recommendations in the other sections.
- The report seemed very catalog-centric. At UCSF, databases are the primary entry point to resources. Hence our emphasis on direct access to the item, that item often being a journal article and not a book.
- We need to explicitly state that staff will have to be re-trained and developed to learn new workflows, procedures, and skills.
- In general, all the recommendations seem to move us from a campus-specific orientation to a more unified UC orientation.

Specific comments/concerns articulated in the discussion about the top ranked recommendations:

I.1 Provide users with direct access to item (13 votes)

Pursue: I.1b: Provide an “I-want-this” button that is present when the context warrants, with the goal of always offering a fulfillment option. No dead ends. Give the user an option to specify turnaround time; work behind the scenes to fulfill as well as we can.

- Users are interested in getting item, not where it’s located.
- Users don’t want to click or read or make choices; need to develop good visual design so it’s obvious what to do next; need to simplify and eliminate unnecessary choices/options.

II.2. Support searching across the entire bibliographic information space (13 votes)

- When doing this, recommendation **II.2b** becomes extremely important. Result sets need to be faceted to provide easier access to the information the user is looking for.

II.1 Create a single catalog interface for all of UC (9 votes)

- If we do this, then the default must be to search our own campus holdings first. Or make it easy to tell if it’s available at your campus (like the NCSU catalog that makes it clear if it’s checked out or available).
- Let users know where the nearest copy is located if not available at your campus.
- Campuses need to be able to brand the interface.
- Single interface refers to the user interface and the back-end (e.g. acquisitions & cataloging) interfaces.

III.1 Rearchitect cataloging workflow (9 votes)

- Could mean layoff in technical services, retraining existing staff, and hiring more IT staff.

IV: Supporting Continuous Improvement (8 votes)

- If we’re going to do this, then it’s very important we put in procedures that make sure we continually improve our systems. Otherwise, in another 10 years, we’ll be back where we are now.
- Need to provide robust reporting mechanisms that help us make more informed decisions.

I.7 Provide relevance ranking and leverage full-text (7 votes)

- We need to provide some sort of relevancy ranking. Need data on which to base relevancy.
- Anything is better than arbitrary ranking/sorting of results that we have in our current systems.
- Have to make clear what relevancy is based on.

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.

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?

The group saw issues with both recommendations. A possibility is to do a combination of both: collaborate with an outside party to build the interface but still maintain local control of the OPAC.

The group liked the idea of working with Google or another non-library partner. One benefit to this is that they would treat the data as data whereas library vendors are more likely to treat it as MARC records, which would seem to limit our ability to search across the information space.

The concerns with outsourcing the OPAC included:

- would we be able to do local branding of the site
- how much would we be able to customize the interface or would we have to accept what they offer
- as far as we know, we would be the first university to outsource our catalog to an outside vendor, so there would be a lot of learning on both sides of the fence
- We are concerned about losing control of our data (e.g. would this affect our ability to troubleshoot user problems?).

On the other hand, outsourcing would allow us to focus on doing other projects because someone else would be running the system. Also, people liked the idea of outsourcing to a vendor that can put us at the front of technology and build excellent user interfaces.

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.

QUESTION 4a:

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?

The group tended to favor “Consolidate cataloging into one or two centers within UC.” We felt that the first option (“Coordinate cataloging expertise and practice across the entire system.”) has been tried in the past and failed. In general, it was felt that more cost analysis needed to be done in this area before determining what path to take.

Some concerns about consolidating cataloging included:

- Does consolidation work against the idea of “Acquire-Put on Shelf with existing metadata-Begin ongoing metadata enhancement process through iterative automated query of metadata sources”? It may make it longer for items to get on the shelf. At a medical campus, timeliness is key.

- Having cataloging and acquisitions off-site would hamper our ability to do rush orders.
- Wouldn't work for unique materials, such as archives.
- Could we accomplish consolidation via technology instead of physically locating services into one or two locations?
- Might work better for digital resources (see Shared Cataloging) rather than print.
- Need to make sure to tie in acquisition function as well. Need to look at the whole process.
- In general, many details to work out, but the concept is good.

QUESTION 4b:

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?

The group didn't feel like it understood the 3 options well enough to be able to comment on this question. We did feel that we would not want to pursue option3. For one thing, it would require everything be in MARC, which is too limited.