

Systemwide Operations and Planning Group (SOPAG)

Action Minutes

Friday, February 25, 2005

9:30am – 2:30pm

East Bay Conference Center, 353 Frank Ogawa Plaza

Recorder: Julia Kochi

Present (SOPAG): Trisha Cruse, Bernie Hurley (chair), Julia Kochi, Marilyn Moody, Terry Ryan, Susan Starr, Lorelei Tanji, Stefanie Wittenbach

Present (guests): Peter Brantley (CDL), Luc de Clerc (UCSD), Jim Dooley (UCM), Laine Farley (CDL), Amy Kautzman (UCB), Carole Kiehl (UCI), Karl Kocher (UCD), Nancy Kushigian (SLP), Gary Lawrence (SLP), Patti Martin (CDL), John Riemer (UCLA), Roy Tennant (CDL), Steve Toub (CDL)

Absent: Patrick Dawson, Kate McGirr, Bruce Miller, John Tanno

I. Bibliographic Services Review

The morning was spent discussing the review of bibliographic services. John Riemer, Steve Toub, and Roy Tennant gave short presentations to provide some background and set the stage for the rest of the morning's discussion. After the presentations, Laine Farley facilitated a discussion that centered on 4 questions.

A. What are the 3 most important outcomes you would like to see from this task force?

1st Tier Responses:

- A clear vision and a set of design principles.
- A roadmap for addressing the problem and architecture on how to do it.

2nd Tier Responses:

- Specific action items.
- A plan for integration of data from different information silos (not only the library or UC).
- A clear statement of the problem.

Other ideas/outcomes from the brainstorming:

- Reflect unified UC systemwide decision and way forward. Think as UC.
- What are the better things to be done centrally and what are things that need to be done on the campuses.
- Architecture (central vs. campus). Separate and modularize what do. Sep. content from display. Come up with architecture plan that is modular and interoperable.
- **Clearly state the problem.**
- Ability to accommodate various metadata schemas.
- Strong user focus. A criterion for success is user satisfaction.
- Usability study that states requirements that lead to metric for success.
- Flexible building blocks to meet changing user needs. Recognize that users don't necessarily know what they want. Have something flexible that can change over time and as user needs
- Environmental scans that look at technologies not utilizing and see what other consortia are doing
- **Specific action items.**
- Identify costs and cost avoidance.
- Include collaborative collection development and acquisitions.
- Functional requirements for vendors.
- **Vision, design principles.**
- Description of information environment of where we'd like to be.
- **Roadmap/architecture**
- Metadata requirements.
- State problem clearly and communicate it down to the staff.
- Prioritize requirements.
- Roadmap for staff skills needed.
- Create a compelling story to unite why this needs to be done, why important, benefits, etc. (maybe SOPAG's responsibility).
- What should TF do vs. others
- Draw upon work done by other groups/coordinate work.
- Structure broad discussions with library staff and users.
- Broad vision to include more than just UC (nat'l, internat'l)
- Assessment of what it would take to implement different scenarios
- Practical steps UC can implement.
- **Integrate data from various silos (not only library or UC).**
- Aim for simple solutions.
- Try and find solutions that allow early successes and low hanging fruit.
- Align solutions with commercial world, broader community.
- Balance of vision, simple solutions, solving UC problems.
- Where does uniqueness really count?
- Vision of truly integrated system.
- Priority for service development.
- Broad vision and a path to move forward with vision (where to go in the future but maybe have smaller groups to actually implement).

B. What services are part of "bibliographic services" - either current or future? What are the highest priorities?

- Those that make a difference to users. This will need to be broken down. What does that mean? Which users?
- Services that aid in an integrated discovery process.
- Boundary services (e.g., APIs) for integration with other services. Those services that let us "play well with others."
- Collaborative collection development and management.

Other services discussed:

- Bibliographic control or cataloging
- **Bibliographic services that make a difference to the end user**
- Metadata catalogs for both owned, licensed, and free collections
- Metadata beyond descriptive, incl. technical, full-text,
- ERMS
- Personal bibliographic services
- **Collaborative collection development and management**
- Personal bibliographic services to use for acquisitions and collection development for library staff
- Exploit commercial metadata (e.g., ONIX)
- **Boundary services (e.g., APIs) for integration with other services. Take what we do and make it easily accessible to other campus systems (play well with others).**
- ILL
- **Bibliographic services that aid in the integrated discovery process.**
- Bibliographic means more than just books or print. Incl. all media and formats.
- Services that encode and express behaviors of collections
- Copyright - rights metadata
- "Kitchen sink" - from different perspectives
- Archival and collection level description
- Which services should be independent and which should interact.
- Shared services

C. What criteria should the task force use to determine success of their efforts?

1st Tier Responses:

- Less pain, less effort to accomplish what we're currently doing.

- Something actually happens (not just a report or another group to discuss); the report is substantive enough and concrete enough that action can be taken.

2nd Tier Responses:

- Users choose us first for discovery.
- More UC wide collaboration.

Other criteria of success:

- More bib services to offer
- **Less pain, less effort**
- **More collaboration UC wide**
- Accommodate many more metadata schema; integration with more metadata
- Less duplication
- **Something actually happens (not just a report or another group to discuss); report enough substantive and concrete enough that action can be taken**
- **Users choose us first for discovery**
- Involving broader community and there's buy-in.
- Accomplishing user requirements
- TF work within specified timelines.
- Identify staff development
- Done something that supports flexibility of different types of services.
- Develop architecture that removes barriers to integration.
- Solutions work with external partners (e.g., RLG, OCLC)
- Clear understanding of what shared infrastructure and building blocks needs to look like
- Metrics that show that people are using our service (e.g., # of users grow).
- Meeting the users' needs.
- Getting campuses to embrace solution
- One finding tool

D. What should the task force avoid?

- Scope creep
- Long discussions over semantic issues
- Confounding UC's bibliographic information with bibliographic services
- Defining services as everything we do (i.e., the "kitchen sink")
- Dwelling in the past or present (i.e., we've always done it that way)
- Complex solutions (not only architecture but metadata structures)
- Reinventing wheels
- Isolation
- Duplicating the effort of other groups (at all levels)

- Vision too broad to be achievable
- Losing vision

Next Steps?

Charge group to think at highest level, layout framework, principles (e.g., bib information should live in one place and be available to different services), roadmap that allows us to take multiple routes at one time. Group comes back to SOPAG with "here's how we see the world and here's what we think needs to be done." SOPAG reviews and then potentially charges other groups to move forward.

ACTION: Hurley will draft charge.

II. UL's Scholarly Publishing Summit

Reps from SCO and CDC attended the Feb. UL meeting to gain clarification from ULs. The summit will take place at UCLA in early May (perhaps May 5). Exact attendance is still being decided.

ACTION: Hurley will send SOPAG a copy of the UL's charge to CDC and SCO.

III. RSC Request to Block Checked Out Reserved Items

The current policy is that if your campus has something on reserve, your students, grad students and faculty can't request it from another campus. However, there is a loophole in current policy because if the reserve item is checked out, it can be requested.

Mary Heath estimates it would take 40 hours work of programming time to implement a solution that would close the loophole. It probably would not be implemented equally across campuses because of the way reserves are noted in each system.

SOPAG discussed the proposal and felt they needed a better understanding of the positive and negative impacts, both on users and ILL departments. SOPAG decided that the more general question was whether or not users from a campus should be able to Request items from another campus that are on reserve at their campus. If yes, then the current policy should be changed. If no, then the loophole should be closed.

ACTION: Starr will go back to RSC and ask them to work with HOPS to analyze which position will have the least negative effect on our patrons. The recommendation should include the analysis and a statement of workload.

IV. Government Information

SOPAG discussed a draft report authored by Moody.

ACTION: Moody will summarize issues surrounding GPO's change in strategic vision.

ACTION: Hurley will ask CDC to evaluate if GILS should be charged with analyzing the system-wide impact of the GPO changes and suggesting possible collaborative responses.

ACTION: SOPAG will discuss further at future meetings.

Next meeting: March 18, conference call from 1-4pm. April 22 meeting will be an in-person meeting 712 Kaiser in Oakland.