

Systemwide Operations and Planning Group (SOPAG)

SOPAG Meeting, April 19, 2002, Action Minutes

See also <http://libraries.universityofcalifornia.edu/sopag/>

Present: J. Tanno (Chair), A. Bunting (recorder), T. Dearie, B. Hurley, J. Kochi, B. Miller, P. Mirksy, K. M. Gurr, M. Moody.

Absent: S. Lessick, J. Ober.

Guest: L. Farley

1. Joint UL/SOPAG Meeting

SOPAG will meet on May 9th from 1-5 at the Radisson near LAX. The joint meeting with the University Librarians will be on May 10th, 8:30-1:30, including lunch.

2. Access Integration Report, Next Steps

Bernie Hurley reported on a discussion of access integration he recently had with the Heads of Systems, a group of technology directors from large ARL libraries. The group noted that when users say that they want to be able to conduct Google-type searches they want the ability to search across at a certain level of metadata and the ability to drill down from an initial set of results. Google searchers are conducting searches across a homogeneous set of materials (web pages) and thus get homogeneous retrieval. The group then considered ways to provide Google-type searching for the varied types of materials ARL libraries have selected. One way is to do broadcast searching, but this approach is problematic because it doesn't scale across a large number of target systems. Creation of union catalogs is at the other extreme of possible approaches. They considered a solution in the middle. The most logical response to a user could be to present results sorted by format (e.g. books, journal titles, images, finding aids). If UC were to adopt this approach we would create a limited number of catalogs, sorted by format. It would be important to avoid duplication between these catalogs.

Actions: SOPAG members should think about the model described by Hurley in relation to the questions posed in Hurley's 3/7/02 discussion document. SOPAG will have further discussions at its May 9th meeting.

3. Digital Reference Update

No news due to Lessick's absence.

4. Privacy Task Force Report

Further discussion deferred until SOPAG's May 9th meeting. All campus groups comments on the report are due to Tanno on May 1st.

5. Library Staffing Issues and Concerns

McGirr and Tanno reported that the UC Heads of Human Resources had a good discussion on recruitment and retention at their recent meeting. Pat Hawthorne (UCLA) and George Bynon (UCD) are members of an ACRL committee that will soon release a report on this topic. The group decided that it was time to conduct a systemwide effort to review the library assistant series concepts, especially to reflect the addition of technical skills.

6. Workshops

6.1 Circulation Best Practices. The Circulation Advisory Group has decided to narrow the focus of their first workshop proposal. SOPAG reviewed the draft proposal and made suggestions for changes for Dearie to take back to CAG.

6.2 UC Digital Library Forum. SOPAG reviewed the draft proposal and approved it. Several suggestions for changes in the workshop description and focus were made, which Hurley will convey to the program committee. SOPAG recommended that first priority for participation should be given to those responsible for digital library projects. It is not clear that the usual SOPAG formula for participant slots should be applied for this workshop. Bunting will update the formula and send out the initial calculations for further discussion.

Actions: Dearie and Hurley will provide feedback on workshop proposals to the sponsoring groups. Bunting will update the attendance formula.

7. Rights Management in a Digital Environment

SOPAG will request clarification from the University Librarians about the need for appointing a group to explore a range of issues related to rights management of digital resources licensing, archiving, preservation, perpetual access, dissemination, and the like.

8. Electronic Records Management

Charlotte Brown, Chair of the UC Archivists Council, will carry forward the concerns expressed in the Electronic Records Management report to the UC records management group. John Tanno will obtain a status report from Brown. McGirr noted that the new records manager at UCSC, Chuck Piotrowski, is a librarian and Kate will alert him to the report and our concerns.

Actions: Tanno to contact Brown; McGirr to orient Piotrowski.

9. Strategies for CDL Collections in an Era of Budgetary Constraints

Mirksy noted that this topic is on the Collection Development Council's agenda. SOPAG agreed that it is not too soon to start developing methods for deciding on print archival responsibility.

Actions: Mirksy will inform CDC that developing strategies should be a priority for CDC this year.

10. Report on CDL-Related Items

10.1 Melvyl Transition

10.1.1 Non-UC Monographic Records. Farley distributed the summary of campus responses on non-UC monographic records. CDL has conducted fact-finding meetings with the Calif. Academy of Sciences and the Calif. State Library. Meetings with the Graduate Theological Union and the Calif. Historical Society are scheduled for next week. Farley will send out a summary of the meetings when all are completed. SOPAG will discuss the report at its May 9th meeting.

Farley requested that SOPAG members gather qualitative data on the value of the non-UC periodical records in CALLS to each campus. Dearie can provide ILL statistics for all UC requests sent via OCLC. SOPAG will try to obtain data in time for discussion on May 9th. The Library of California has requested that CDL conduct a CALLS Periodical database user survey. The survey will be conducted online in May.

Actions: SOPAG members will gather qualitative data on the value of the non-UC periodical records in CALLS by May 9th. Dearie will provide data on ILL borrowing from the institutions.

10.1.2 Record Improvement Projects. CDL is conducting an analysis of the 22 record improvement projects using the criteria developed by SOPAG: priority 1 (correcting records so that they are in compliance with the new Melvyl standards); priority 2 (proposals that enhance resource sharing), and priority 3 (increase the visibility of records in Melvyl). Some of the projects claiming to fit priority 2 are being investigated further to understand the level of impact on resource sharing and 4 do not meet any of the criteria. SOPAG affirmed that priority 2 is meant for projects that have a direct effect on resource sharing, rather than general record improvement. A recommendation on which projects to fund will be made by CDL to the University Librarians for discussion at the joint UL/SOPAG meeting on May 10th.

10.1.3 Legacy Melvyl Circulation Links for UCD, UCSB and UCLA. There was insufficient time to adequately discuss this policy document.

Actions: CDL, UCD, and UCSB will discuss ExLibris options. Bunting will gather UCLA reaction to the proposal.

10.2 A&I Transition

The task force met recently and is planning for the Fall roll out. Work continues with the release of OVID databases, Current Contents and Inspec were recently released. BIOSIS still "in the barn."

10.3 Digital Visual Resources Planning

SOPAG made a number of suggested revisions to the draft charge.

Actions: Tanno and Farley will send out a revised draft that will be finalized at SOPAG's May 9th meeting. SOPAG members should be prepared to submit names for the task force membership at the May 9th meeting.

10.4 eScholarship

The April update is available on the web <http://escholarship.cdlib.org/about.html>. Campus visits are taking place.

10.5 CBS Update

It is necessary to delay implementation of VDX for a month. The link to OCLC should be turned on by May 10th, and UCLA and UCSD expect to "go live" the end of May. CDL has been hearing some reports of slow response time and is checking this out with the vendor. A new version of the software will be out in the summer with a number of enhancements. Concern about version 3.0 of ARIEL was expressed, since it does not work well with the Minolta 7000 scanners. RLG is aware of the problem but has not scheduled the programming to fix it.

Actions: John Tanno will ask Gerry Munoff to talk with the RLG director about UC's concerns.

10.6 CMI Update

No report due to lack of time.

10.7 CDL Directory Enhancements

No campus was ready to commit to submitting records pending answers to a number of technical questions. Farley noted that there is no technical obstacle to accepting records for "free" resources in the three format categories specified. CDL needs to do further analysis to determine if it would be possible for a campus to update its file by sending a file that would completely overlay all previously submitted records, rather than doing manual updating/deleting. Farley confirmed that the default display for anyone accessing the Directory from a campus IP address would be limited to that campus' records, plus CDL licensed material. She also confirmed that the user interface enhancements would be those designated for "immediate" action in the Task Force on Access Integration report (Appendix B).

Actions: Farley will inform SOPAG of the feasibility of updating via total overlay and the projected timeline for completion of the Directory enhancements once campus commitments are obtained.

10.8 Shared Cataloging Program

No report/discussion due to lack of time.

Next Meeting: May 9-10, 2002 (recorder: B. Hurley)

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