

Systemwide Operations and Planning Group (SOPAG)

SOPAG Meeting, June 29, 2001, Action Minutes

Present: P. Mirsky (Chair), A. Bunting, B. Hurley, C. Howard, C. Johns, L. Kennedy, J. Kochi (Recorder), S. Lessick, K. McGirr, J. Ober, J. Tanno. **Absent:** B. Miller

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

I. Electronic records management proposal:

Mirsky announced that the revised proposal should be distributed to SOPAG in mid-July to allow time for campus consultation prior to the SOPAG discussion on July 27th.

II. Workshops:

The metadata workshop task force is restructuring its original plan for a workshop and proposes to bring together digital library developers in UC libraries. The workshop would focus on metadata, the CDL digital object standard in particular. The task force is currently consulting with LTAG on this idea and hopes to have a tentative agenda for review by SOPAG at its July 27th meeting.

The University Librarians approved funding for the copyright workshop. The workshops will be held October 25, 2001 at UCI and October 26, 2001 at UCB. The UC Standing Committee on Copyright will be informed of the workshop offering by Karen Butter, who is a member of the standing committee.

III. Collection Management Initiative:

Johns distributed the preliminary results of the "true pairs" database that identifies approximately 220 titles for which campuses have indicated a willingness to serve as experimental or control sites. Project staff is working on finalizing this list plus the two lists of unmatched titles (experimental and control). Campuses will be asked to volunteer to take on some additional titles from these lists in order to reach the project goal of 300 titles.

The project is slightly behind schedule. The goal for having the experimental titles in storage is mid-August this may be delayed.

The project web site is in design.

Johns had a meeting with NRLF and SRLF staff during ALA, the RLFs are ready to proceed with the storage of the experimental titles.

IV. CDL Related Items:

Transitions/Melvyl and A&I - Melvyl-T Policy Issues:

Cris Campbell joined the meeting to discuss two related policy issues sent to SOPAG: "Record Standards and Level of Holdings," which deals with input streams from the UC campuses and the level of local holdings information that will be displayed in Melvyl and "Archiving of Campus Input Files and Returnability of Campus Records."

The Melvyl Implementation Team recommended that the union catalog serve as a resource identification tool and give enough local data for the user to go to the shelf. The catalog would identify the campus that holds the item, provide location, call number, summary holdings and shelving notes. A link to the campus system would provide circulation information. Only summary holdings would be available for serials titles. Further, the team recommended that the practice of retaining archival copies of campus input files indefinitely at the CDL be changed to a retention period of one year and that CDL continue to provide the service of creating "database extracts," in which copies of campus records are returned in MARC format to the campus upon request.

Hurley noted that UCB currently sends copy level records to Melvyl and uses it as a back-up for GLADIS; Hurley expressed concern that adopting the recommendation would mean that this would no longer be possible. Campbell explained that allowing back up for copy level records would increase processing and volume costs if all campuses were able to do it but was unsure of the amount of the increase. Generally, SOPAG agreed with the recommendation but would like further analysis of the disadvantages of allowing copy level information to be stored.

ACTION: Campbell will take the question back to the Melvyl Implementation Team and do a deeper analysis of the work required to store, but not display, volume and copy level information.

The Melvyl Implementation Team also recommended that the 1990 UC Records standard document be reviewed and updated to determine the most acceptable standards for bibliographic records and summary holdings, e.g. OCLC, RLIN, and MARC21. SOPAG endorsed this recommendation and agreed that the Melvyl-T Database and Technology Team was the appropriate group to review it and that the reviewed document should go through LTAG before being brought to SOPAG. It was also recommended that one standard be adopted (MARC21) and that the impact of this recommendation on the campus level should be examined.

ACTION: The Melvyl-T Database and Technology Team will revisit the standards document. At the same time, adoption of one standard and the impact on a campus level of doing so should be considered.

Transition Workshops:

Ober reported that CDL is planning two workshops for Library staff: 1) Teaching for Self-Directed Learners: Managing the A&I Database and Transitions and 2) Usability Workshop for UC Library Staff Evaluators.

The Education Workshop is being developed to provide library staff with the tools to teach information competency/literacy rather than specific tools. It is not designed to be a train-the-trainer workshop but is designed to have librarians involved in instruction attend. The event is planned for up to 60 attendees (limit set by instructor) at each site; maximum campus attendance will be calculated using SOPAG's attendance algorithm. Tentative dates are September 10, 2001 at UCB and September 12, 2001 at UCI.

The Usability Workshop is designed to enhance local expertise of usability methods in order to better inform the Melvyl-T design process as well as local usability studies. Working with SOPAG, Ober will recharge the CDL Evaluation Liaisons on campuses this summer, and they will be the main audience for the workshop. The event is planned for up to 35 attendees at each site; with equal numbers of participants from each campus. SOPAG and HOPS representatives will receive courtesy invitations. Tentative dates are November 5, 2001 at UCB and November 7, 2001 at UCI.

ACTION: Ober will request nominations for continuing or new CDL Evaluation Liaisons through SOPAG (followed by confirmation from ULs). Ober will post announcements of both workshops in CDLINFO-L and make the process of selection clear. Campuses will be asked to supply names for the workshops and are asked to submit names early so unfilled slots can be made available to other campuses.

Request, CBS, Desktop Delivery:

The Desktop Delivery committee has submitted its recommendation. The ULs accepted the cost model developed by Bunting and Bellanti to distribute the available Resource Sharing funds to be used by the campuses for the acquisition of desktop delivery hardware; each campus will receive funds for at least one Minolta 7000 workstation/scanner. RSC will provide guidance to campuses that wish to move forward with desktop delivery before the delivery of the CBS. Reports are that Relais Express and Ariel 3.1 will do what is necessary to be able to offer desktop delivery as an interim strategy before the CBS software is available, but the release date for Ariel 3.1 is still uncertain. The Request Team must do work before desktop delivery can work with the Request interface.

ACTION: Ober will ask Request Team to clarify what needs to be done for desktop delivery to work within the Request interface.

Hurley reported that the CBS RFP process had stalled earlier in the month but that they are now proceeding. Contract negotiations with the apparent successful bidder are set for the end of July 2001.

The Special Collections Request pilot officially began June 14, 2001.

ACTION: In August Mirsky will ask SOPAG to talk with campus contacts to see how the special collections pilot is going (e.g., number of requests, problems, etc.).

Bunting reported on an RSC report on the causes of TRICOR delivery problems. UCD has been collecting data on the issue. The report notes that 80% of delivery problems are because of ILL staff misaddressing packages. Actual damage to material occurred in only a small percentage of the remaining 20% of problems. RSC is going to recommend that the collection of data be discontinued.

ACTION: Bunting will inform RSC that they need to send forward a formal recommendation about discontinuing data collection so that SOPAG can share this information with CDC and the UC Preservation Group.

Visual Resources Planning:

Mirsky reported that the ULs might send SOPAG a charge to create a task force to investigate the feasibility of a collaborative visual resource collection. A discussion concerning the scope of such a possible project took place. Noting the ULs discussion of possible pilot studies for the sharing of visual resources, SOPAG discussed the advantages of inventorying the collections that currently exist to determine the extent of a sharable corpus, analyzing the relationship or tradeoffs between presentation/manipulation and collection management tools, and articulating the issues that must be addressed, such as copyright and usage rights, before any systemwide pilot studies are launched.

CDL Updates:

Migration of access from the CDL-hosted OCLC Z39.50 databases ("@OCLC" databases) to the FirstSearch interface has been moved up a year to December 2001 due to upcoming changes in OCLC's provision of Z39.50 services.

The CDL UL recruitment is moving forward. The search committee has conducted screening interviews and is compiling a list of finalists. The desire is to have an appointment by Fall 2001 and a start date in January 2002. The search committee is developing a second interview schedule that is as inclusive as possible while still remaining practical.

Ober led a discussion concerning the Digital Library Federation and ways that CDL could represent and communicate UC interests to and from the DLF. DLF Forums, the last of which was heavily attended by UC library staff, is an important and practical way to facilitate interaction. A. Bunting reported that UCLA is joining DLF.

ACTION: Ober will ask the ULs for a discussion about how best to leverage CDL's membership on behalf of all of the UC campuses.

V. Task Force Updates:**Digital Preservation:**

Hurley reported that they have held their second meeting. They have decided to focus on the creation of a preservation repository rather than an archive, in part due to the multiple meanings of "archive." The goal of the report is as much educational as defining the next steps.

Digital Reference:

Lessick reported that the task force is moving forward. They're very focused and well organized. They decided that they would not focus on the future of traditional reference but focus on digital reference. They are on target to meet their mid-October deadline.

Privacy:

Mirsky said the Privacy task force also is moving forward. They've scheduled a series of conference calls to facilitate their progress.

Access Integration:

Kochi reported that the task force has met in-person twice and has recently begun bi-weekly

conference calls. Currently they are focusing on the role of the CDL Directory. Some campuses are waiting for the task force's report to decide on whether or not to input local holdings in the Directory.

VI. All-Campus Groups:

Mirsky led a discussion concerning the all-campus groups. Should SOPAG work more closely with the chairs of the all-campus groups to help them identify annual goals and objectives?

ACTION: Mirsky will let the chairs know that goals are due to SOPAG by October 31, 2001. Additionally, she will invite the chairs to the December 7, 2001 SOPAG meeting.

VII. Next SOPAG meeting is scheduled for Friday, July 27, 2001 in Oakland.

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