

University of California Libraries

Collaborative Reference Project Team Charge

Objective:

The UC Libraries Collaborative Reference Project Team is charged to investigate and make recommendations to the UC Libraries Direction & Oversight Committee (DOC) regarding the appropriate model for collaborative reference services provided by the University of California Libraries.

The UC Collaborative Reference Project Team will:

1. Investigate alternatives to the current 24/7 system-wide collaborative reference service model
2. Recommend to DOC whether the current service model should be continued or a different model should be implemented
3. If a different model:
 - a. Recommend new model including:
 - i. Service platform to be used
 - ii. Service hours
 - iii. Staffing model for the service
 - iv. Expertise level needed by those staffing the service
 - v. Estimated costs to provide the service
 - b. Provide a general implementation plan

Areas for the team to consider:

- Previous assessments of the current service model
- End-user needs
- Platforms that support collaborative reference services and their costs
- Alternative service schedules
- Requirements for service staffing, both for management and service provision
- Level of expertise needed to provide service
- Ability for individual campuses to opt in/out (i.e. tiered participation)
- Service management and evaluation requirements and workflows
- Overall service costs
- Risks inherent in alternative, non-24/7 models

Background:

In 2009 the UC Libraries joined the OCLC QuestionPoint 24/7 Reference Cooperative service to provide UC students, faculty, researchers, clinicians, and staff with reference and information services via chat around the clock. Currently all campuses contribute staffing to the service and all campuses and CDL contribute to its annual cost.

In 2018 the UC Libraries Direction and Oversight Committee (DOC) charged a project team to assess the UC Libraries version of the 24/7 service, branded as our '24/7 Ask a Librarian' service, and make a recommendation to continue, modify, or terminate the service. The assessment, conducted in late 2018 and submitted to DOC in early 2019, provided meaningful information and included the team's recommendation for UC to continue participation in the OCLC 24/7 Reference Cooperative, which was undergoing much needed improvements to its chat platform, for one more year.

DOC accepted the recommendation and extended UC's participation in the 24/7 Cooperative for one more year to maintain the stability of our current service while also providing us sufficient time to investigate alternative collaborative reference models. As the Ask a Librarian assessment showed, it is unclear if a reference chat service covering 24/7 is necessary and there is significant support for a UC-only chat reference service staffed solely by UC library personnel. These results along with other issues such as the sale of the OCLC QuestionPoint 24/7 Reference Cooperative service to Springshare, cooperative staffing requirements, and service costs warrant study of other possible service model options.

Project Team Membership:

The membership of the project team represents both system-wide and campus expertise:

- System-wide service management and coordination
- Campus user services leadership
- Campus service management and coordination
- Campus service delivery

Members:

- Kiyoko Shiosaki (UCB)
- Sarah Houghton (CDL)
- Alesia McManus (UCD)
- Antoinette Avila, Ask a Librarian Manager (UCI)
- Alison Regan (UCI)
- Antonia Osuna-Garcia (UCLA)
- Elizabeth McMunn-Tetangco (UCM)
- Gayatri Singh (UCSD)

DOC Liaison: Alison Regan (UCI)

Tentative Project Schedule:

- Team forms in July 2019 and reviews and endorses charge
- Team recommendation(s) due to DOC by November 30, 2019
- DOC reviews and makes decisions regarding recommendations by January 31, 2020
- If different model is recommended, launch completed by June 30, 2020 with full implementation completed by September 30, 2020

Communication:

The team will provide regular updates to DOC through the DOC Liaison.

Approved by DOC July 12, 2019