

## **HOPS Meeting June 11, 1999**

### **Location:**

Room 612, Kaiser Building  
300 Lakeside  
Office of the President, Oakland

**Participants:** Laine Farley, CDL; Patrick Dawson, LAUC; Lee Leighton, Berkeley; George Bynon, Davis; Susan Lessick, Irvine; Allison Bunting (for Janice Koyama), UCLA; Venita Jorgensen, Riverside; Jacqueline Hanson, San Diego (Chair); Jacqueline Wilson, San Francisco; Detrice Bankhead, Santa Barbara; Cheryl Gomez, Santa Cruz.

### **Summary of the meeting:**

#### **Agenda items:**

##### **I. Update on CDL Education Working Group progress:**

S. Lessick discussed her 6/8/99 e-mail to HOPS which outlined the recent work of the CDL EWG. She mentioned that John Ober was developing a "communication kit" which has a set of educational/outreach materials that can be easily adapted for the local campuses to educate library users and staff. He will be contacting HOPS about this effort shortly. In HOPS' discussion of this topic, it was clear that all of the UC libraries are at a very early stage in the process of educating our own staff as well as library users about the organization, goals and tools of CDL, and that we all sense an urgency about doing so. There was general agreement that library staff will probably be easier to reach than our users. Susan also provided background and an analysis of the draft list of proposed projects developed by the EWG.

The proposed projects from the EWG list that HOPS endorsed in this discussion were:

- 5. Adopt/adapt/create online tutorials aimed at undergrads: either create collaboratively or purchase.
- 7. Develop training resources/programs for Teaching Assistants or Graduate Student Instructors who training undergraduates. (Draw from UCLA program.)
- 9. Develop modular training that librarians can use on the campus, picking and choosing.
- 13. Establish criteria for assessing or "grading" a resource which summarize the degree to which it is "self-instructing."
- 16. Promote best practices for education of digital resources.
- 18. Develop programs directed toward graduate students and library staff.
- 22. Establish instruction liaisons on each campus.

There was agreement that J. Hanson, as HOPS chair, will contact J. Ober to express HOPS' support for the work that the EWG has done to date to identify projects of interest to that group and will request that when EWG has identified their highest priority projects for action, HOPS would like to review and comment on the list before it is finalized.

## **II. Quick response/round robin topics:**

A. What are the individual libraries doing with print runs of serials which have electronic equivalents?

Response from all HOPS members was uniform: so far, none of the UC libraries have moved any print serials out of their stacks as a result of subscribing to their electronic equivalents. To date, concern for the stability of the electronic medium and for publishers' reliability are still big issues, as is the fact that a "weak link" at any point in the transmission process can make electronic journals inaccessible. There was recognition, though, of a probable future scenario in which a paper copy of a journal would be held at SRLF or NRLF as the UC archival copy, with the campuses relying on electronic text. It was noted that a UC group called the Task Force on Collaborative Strategies for Archiving of Print in the Digital Environment is working on this issue and has been charged to produce a status report next November, a preliminary report in January, and a final report in March 2000.

B. Which campuses have moved closer toward, or have implemented,

1. effective authentication for remote users of licensed databases?

Irvine is in the lead on this issue. They have had a proxy server working for a year and a half. They no longer require passwords for access to licensed databases. San Francisco has coordinated with a commercial Internet service provider in the area to provide full access to licensed databases. Santa Cruz will have a small proxy server up by this fall. San Diego hopes to do the same. UCLA is testing the use of certificates with CDL databases. The tests will run through this month. Currently, Bruin Online users can use all licensed resources without passwords as long as they dial into the campus backbone network. In the fall a service called Bruin Gold, unrelated to the current tests, will expand the Bruin Online services by providing campus affiliates with access to a local ISP so that they do not have to incur toll or long distance charges. L. Farley noted that evolving Web technology can sometimes cause proxy servers to fail unexpectedly.

2. electronic reserves?

Berkeley, Santa Barbara and Santa Cruz all are using DocuTECH to put materials such as class notes and exams on a Web site. At Berkeley faculty members can FAX documents to the system. Irvine is using Innovative's module for electronic reserves. The system is popular but Irvine has experienced some printing problems with the system. San Francisco has been studying San Jose State's use of the Innovative module for possible adoption but has not yet implemented an e-reserves service for printed materials. San Diego hasn't either, but a month ago a group was charged to study this issue and recommend a new program. In all of the UC cases of active e-reserves services, both non-copyrighted materials (exams, class notes) and copyrighted materials (published journal articles) are being digitized and displayed on a Web site. Additionally, UCLA and San Diego

have digitized audio reserves for music courses, and San Diego has digitized images for art history reserves. Riverside has done planning for an e-reserves service but hasn't yet implemented one because of difficulties determining which campus area would cover the costs.

In all cases of copyrighted materials on reserves described above, the onus for copyright compliance is placed on the faculty member, and the library assumes that as long as access to the digital reserve material is limited to class members, the doctrine of fair use applies. A different approach to e-reserves is used at Davis, where their campus graphics service runs it for the library. Graphics is the intake point for all reserves requests from faculty and carries out active coordination with the Copyright Clearance Center; thus, everything that goes on reserve at Davis has been cleared through CCC. Davis has had no problems getting timely copyright approval from CCC and no complaints from faculty about this arrangement. CCC has visited the Davis library and endorsed this system..

UC libraries that offer e-reserves services keep a paper copy of each digitized item available for check-out, in case computers go down. The DocuTECH software costs about \$5K - \$6K, while the Innovative reserves module costs around \$20K+. George will distribute to HOPS a recent paper prepared by a Davis student which compares features of available e-reserves systems currently in use in academic libraries.

### **III. Bring background documents on these topics to share with the group, if you have them:**

#### A. Outline of public printing models.

J. Hanson brought one copy of the UCSD MOU on photocopy/printing services and will forward additional copies to D. Bankhead, S. Lessick, L. Leighton and J. Wilson. A. Bunting described UCLA's recent move to a centralized printing model in some of their settings. In the Biomedical Library, for example, all print jobs requested by library users are sent to one of two laser printers, where print jobs appear in a queue, retrievable by a password the user has selected. UCLA charges off-campus users higher prices for photocopying and microform prints but cannot for printing because the Uniprint software cannot support differential pricing. Davis charges higher printing rates to off-campus users. At both UCLA and Davis, access to the lower rates is via cards sold at a staff-mediated desk. UCLA estimates that about 50% of their copy use is from off-campus users. The HOPS members next reported on current printing prices at each of their respective libraries. S. Lessick recorded the figures for each campus.

B. Policies to address use of public terminals to access pornography for long stretches. Policies on this issue vary among the UC libraries. Davis requires any user viewing pornography to justify his/her use as academic in nature; if the user cannot do so, use of the terminal is terminated. If the user presents an academic rationale, s/he is offered a separate space where such use of a terminal will not offend other users. Most of the UC Libraries have a less clear-cut policy on this issue. San Diego is about to finalize a "tip sheet" for all library staff on how to respond to such situations. When it's complete, J. Hanson will forward copies of it to all HOPS members.

#### **IV. Discussion topics:**

##### **A. Request from SOPAG to HOPS to revise its charge. Related proposed agenda item:**

Redefining a HOPS role: what are we going to focus on? Related request from SOPAG:

Put particular emphasis on innovations in reference in a digital, electronic environment.

In the discussion on this topic, HOPS members reviewed the current context in which HOPS operates, i.e., SOPAG as an oversight group, with the Resource Sharing Committee, the reconstituted ILL committee/group, and the Heads of Circulation group each having an interest in particular areas of public services in the UC library. There was also discussion of the broad areas in which HOPS has an interest and two specific areas in which HOPS has a vital role to play: reference services and instruction. Toward that end, the discussion centered on revising the HOPS charge to reflect these interests in its general charge and its goals for academic year 99-00.

##### **B. Primary Discussion Topic:**

How can we deliver reference services in a shared digital environment? What ideas are being contemplated for the next two-three years, especially as they relate to the digital environment and CDL? What are the next plateaus we should be reaching for in offering reference assistance? How can we better share reference and instructional products? Who knows the current thinking on what potential there is in Web, information, instruction technology? What are the best models for building cooperation while retaining a campus-specific service identity? How would we evaluate the effectiveness of a shared reference service?

The group approached this issue by reviewing current practices among us in electronic reference services. All of the UC libraries offer e-mail-based reference service. Irvine has taken this to what is probably the most advanced level with their "Ask a Question" service. (Coincidentally, Berkeley is about to launch a similar program with the same name.) Irvine takes a team approach to this service; the team calls up queries twice a day and responds within 24 hours. They receive about three queries per day and they find that a few of the questions are very basic and can be answered by Library Assistants (e.g., holdings questions), but most of the questions are far more complicated and must be handled by librarians. They have found that about 75% - 80% of the e-mail queries can be answered with digital resources and that the kinds of questions asked have helped them see how they should revise their Web pages. They incorporate referrals to the Internet Public Library.

The UCLA Biomed Library receives and responds to about 5 e-mail ref. queries per day. A. Bunting commented that the National Library of Medicine has adopted help desk software to track e-mail reference service. L. Farley noted that software called "Remedy" is useful for help desk referrals and added that there was an article in the 5/31/99 S.F. Chronicle at <http://www.sfgate.com/cgi-bin/article.cgi?file=/chronicle/archive/1999/05/31/BU78957.DTL> about new software called LivePerson that lets consumers exchange instant e-mail

messages with living persons providing the service at the other end of the transaction. Might this have relevance for electronic reference service?

Discussion then turned to new types of reference service that none of us are doing at this time but which we may want to try on an experimental basis, such as electronic reference service offered during hours when there is currently no service available at all (e.g., Sunday evenings) and which might draw on digital resources (only) in responding to queries. Next the discussion moved to types of software that might be used among UC librarians to enhance interactions with each other when one librarian turns to another who is a subject expert in an area of a difficult, highly-specialized questions (example: a librarian from one UC campus might direct a difficult query about agriculture to a subject expert at Davis). "Net Meeting" was noted as an example of software that enhances electronic conversational dialogue.

It was agreed that HOPS should be concerned with studying these emerging models of electronic reference service and that we should pursue those that have a potential to enhance services in a concrete way. HOPS will work on the development of a proposal to enhance librarians' electronic communication with each other on referral of difficult reference queries. Among the questions to be considered in planning such a proposal are: What are the values regarding reference services that will translate into an electronic environment? What is the service that we are willing to provide? What audience are we willing to serve? Who are the experts? What mechanism would be needed to facilitate the computer-based conversation that is needed to deliver this service? J. Wilson and S. Lessick volunteered to draft a proposal that would bring these themes together in support of enhanced electronic communication among UC librarians on referrals of reference queries. (Note: after the meeting, J. Koyama agreed to work on this proposal as well.) It was noted that such a proposal should indicate how campuses that participate would benefit, and that thinking about reference service in the context of emerging technologies can allow us to rediscover first principles of reference service.

Next, discussion turned to the need for making more electronic reference/instructional tools readily and widely available to the UC community and the potential for HOPS to be a catalyst for progress in this area. It was agreed that a first step would be an inventory of existing instructional materials, both those that are relevant to UC-wide needs and those that more specialized in nature and unique to each campus, followed by a process of bringing the relevant tools together on a commonly-accessible Web site, followed by assignment of responsibilities for keeping those materials current. There was agreement that an undertaking of this type should probably focus first on some manageable chunk of instructional materials, not the whole universe of same, and that it should probably be built around a system of templates. Some of the questions to be addressed are: Which existing materials are potentially relevant UC-wide? Which materials would need further authoring? What would it take to make those materials portable? There was agreement that HOPS will develop a proposal to ask SOPAG to charge a group to tackle this program and to carry it out as a project of perhaps six months in length. C. Gomez and Lee Leighton volunteered to pursue this project.

### **C. Other Discussion Topics (as time permits):**

1. The CCA's (Central Cataloging Agency) report on cataloging CDL's resources:

if it is available to us to review before 6/11, what are our thoughts on that report?

L. Farley noted that the CCA'S **TFER2 report** is available at:  
<http://neuheim.ucdavis.edu/staff/tfer2> She will send record displays to HOPS members for comments.

2. Role of SOPAG in establishing advisory committees, i.e., constitution of those committees and consultation with ULs. SOPAG is putting together a Web site that will detail and clarify some of these issues, especially the role of SOPAG vis-à-vis CDL. L. Farley reminded HOPS members of their option to access the "Information for UC Library Staff" section of the CDL Web site at this URL:  
<http://www.cdlib.org/libstaff/>

3. Next HOPS meeting. We'll plan to meet next in the fall, probably October, and then again next spring. We'll use conference calls as needed to talk over issues of concern to HOPS.

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