

HOPS Meeting November 5, 1999

Location: UC Irvine Main Library

Participants: Laine Farley, CDL; Patrick Dawson, LAUC; Katie Frohberg, Berkeley; George Bynon, Davis; Susan Lessick, Irvine; Janice Koyama, UCLA; Venita Jorgensen, Riverside; Jacqueline Hanson, San Diego (Chair); Gail Persily, San Francisco; Detrice Bankhead, Santa Barbara; Cheryl Gomez, Santa Cruz.

Summary of the meeting:

Agenda items:

I. Introductions: HOPS welcomed Gail Persily as the new UCSF rep.

II. Announcements and Follow-up on Action Items from 6/11/99 HOPS meeting at UCOP:

a. Venita distributed copies of an announcement about Riverside's receipt of a \$498K National Leadership Grant from the Institute of Museum and Library Service in support of increasing the efficiency of INFOMINE by developing new software to improve Web crawling and the harvesting of Web sites. Riverside invites librarians from other institutions to become participants in adding to the content of INFOMINE.

b. Laine announced that the CDL January release was sent out yesterday, and that the opportunity for staff to preview CDL releases has resulted in much useful feedback to CDL.

c. We reviewed progress of the Action Item from 6/11/99 in which Lee Leighton and Cheryl Gomez agreed to draft a HOPS proposal to SOPAG to charge a group to bring together "in a commonly accessible Web site existing and to-be-developed instructional materials that will enable our users to navigate better the digital resources of the UC libraries." Cheryl recalled that they had drafted a charge and had forwarded it, but she said that she would resurrect it and send it on to the whole HOPS group.

d. We reviewed the progress of the Action Item from 6/11/99 in which Detrice and Patrick agreed to "organize during academic year 99-00 the pilot HOPS-sponsored meeting for UC librarians and staff focused on the theme of best practices in reference and instruction." Most of the discussion on this topic appears below under V. (third paragraph).

III. Round Robin on Current Issues:

a. Any significant (but perhaps not obvious) Y2K-related discoveries among our libraries? Nothing specific at this point, but all have done extensive preparation, and all recognize the potential for consequences that can't necessarily be anticipated. In this discussion, it was noted that the UC libraries' schedules during the holiday period ahead vary widely. Berkeley closes completely 12/24 - 1/1, but faculty there have keys to several libraries.

b. Any wireless LANs in place to support public and/or staff workstations? Only Davis has one, in the planning stage. The Davis campus' Information Technology Office has agreed to cover the cost of installation and laptop cards for setting up a wireless LAN in the library's Extended Hours Reading Room as well as in the Memorial Student Union and the King Law School. The Reading Room will have 24 ports for laptops. San Diego is currently studying possibilities for progress in this area.

c. Any UC libraries getting requests from private and/or virtual colleges for formal affiliations with our libraries as a resource for their students? Several of our libraries have had requests from such institutions. Related problems identified in the discussion were several: When we have entered into agreements with private colleges, we then can't be certain, nor can we control, what kind of publicity they are distributing to their current/prospective students about the services they can expect from us. In some cases, students arrive at our libraries with misinformation as to what services they can expect. It was suggested that since this issue is related to accreditation requirements for colleges and universities, and since the Western Association of Colleges and Universities is currently revising its criteria relevant to academic libraries, it would be timely for us to hear from a representative of WASC on this subject. Janice will invite a contact in the Alameda WASC office to join our Spring 2000 HOPS meeting in the Bay Area so that we can have a broader discussion on this subject and can decide whether the UC libraries need to adopt a consistent philosophy and practice in response to requests from private colleges.

IV. Main Discussion Topic:

"Reference Service on the Web and Newest Supporting Technology," a presentation by: Steve Coffman, Director of FYI, the fee-based research service of the Los Angeles Public Library Susan McGlamery, Project Director of 24-Hour Reference Service of the Metropolitan Cooperative Library System/Santiago Library System in Los Angeles and Orange Counties

Steve and Susan described their work, funded by a LSCA grant, to encourage California libraries to begin using new types of software that could facilitate collaborative approaches to reference service through Web-based tools. The University of Pennsylvania already uses a software of this type; it's called LIVEPERSON.COM. The software demonstrated by Susan and Steve is WebLine, made by the company of the same name which was taken over by Cisco Systems in September. (In late January Cisco and Library of Congress reps will put on a demo of this software at the Cisco HQ in San Jose, and Steve and Susan offered to arrange invitations for any of us who wish to attend.)

WebLine can be seen in use on the Landsend.com Web site currently, and its "Customer Interaction Suite" can be seen at: <http://www.weblines.com/default.html>

This software features a "follow me browser," so that the customer can be led through relevant Web sites by the service provider; thus it is potentially relevant to both reference service and instruction. Steve and Susan suggested that we think about how we could use tools like this to move forward collaboratively in reference service the way libraries began to move forward in cataloging operations 25 years ago. The Library of Congress will be testing WebLine software, as are a number of libraries in Los Angeles and Orange Counties as part of the 24 Hour Reference Project. Some of the Southern California libraries that will be participating in the grant in 2000 are the Los Angeles Public Library and the UCLA Biomedical Library. [NEW NEWS: Since the 11/5/99 HOPS meeting, the UCLA Library and UCI Libraries have also become participants of the 24 Hour Reference Project.] Steve and Susan offered all of the UC libraries an opportunity to participate in trying out this software so that we could get direct familiarity with potential applications of this to the services we deliver.

Janice K. and Susan L. agreed to draft a proposal for the UC libraries to move into a trial of this service, taking into consideration elements such as: Would we want to begin with library-to-library service, or library-to-user service? What kind of infrastructure and hardware is needed? How would we manage authentication? What kind of policies would need to be in place? How would we manage training? Publicity? Timeline? Evaluation? What would CDL's role be? And, how might we build from a pilot project in a way that would scale up to, at some point in the future, a 24/7 UC digital reference service? HOPS members agreed that our efforts should focus on two tracks: each library has the option of trying out the software in ways relevant to its

service program, and the southern libraries will plan some form of cooperative model that would include a "give back" feature to the larger network of participating libraries. There was agreement that our efforts should start small with a group who are keenly interested, with opportunities for play and for trial and error, and then build interest in further development and eventual UC-wide collaboration. It was noted that future 24/7 reference model probably would require a new financial model for support, and also that expanded digital services will probably require alternative models for staffing. It was suggested that HOPS take up the subject of staffing models in a digital library context on a future agenda.

HOPS members thanked Janice and Susan for their efforts in arranging this most interesting presentation and discussion.

V. Joint Meeting/Discussion:

HOPS and the CDL Educational Working Group EWG members John Ober, Susan Lessick (HOPS liaison), Lucia Snowhill, Ellen Meltzer, and Rosalie Lack joined the meeting for a discussion of areas of common interest and collaboration between the two groups. John reported that:

- 1) EWG has just finished its document on program priorities and will send copies to all HOPS members.
- 2) CDL is about to make available to all UC libraries software that enables easy construction on online surveys. He asked HOPS members to be the conduit of info on this topic to our colleagues on our home campuses; he'll send us more more info on this.
- 3) The EWG Web site, thinly populated at present, will feature adaptable outreach materials for the UC libraries. EWG will enhance the materials at this site and will point to additional relevant resources, such as those published by vendors.

Discussion turned to areas of staff development of common interest to HOPS and EWG, of which John identified three: Digital resources; instruction in digital resources; and reference services connected to digital resources. The groups agreed that we wish to collaborate on some form of staff development effort that would highlight and support best practices in these areas. As part of that, we want to acknowledge both the significant stress faced by those public service providers who must continuously learn new tools and skills, as well as the intellectual excitement and satisfaction of working in this kind of milieu.

HOPS and EWG will collaborate on planning a workshop for UC public service people in 2000 as a venue for exchanging views on new ways to conceptualize reference and instructional services and the related tools. This event might be an opportunity to describe the pilot project regarding Web-based reference service described above. Detrice and Patrick will be HOPS liaisons to EWG on planning the staff development event, collaborating to outline the goals, scope and scale, so that a joint HOPS/EWG proposal can go forward to SOPAG and the ULs.

John requested HOPS' agreement to act as a group he can query when he receives offers from vendors or publishers for training opportunities related to their products. HOPS members agreed.

VI. Electronic Reserves Update:

Berkeley and Santa Cruz both use the E-Res system. San Diego has come to this issue late in the game, with only one branch library involved in electronic services at present. However, a group has studied the options and is about to make its recommendations, so UCSD expects to make substantial headway on this front in 2000.

VII. Status of Public Services Statistics in UC Libraries:

Have any of us made significant changes in type or frequency of data collected? Apparently most changes we've made have been of a "tweaking" nature, e.g., UCLA has redefined its categories of instructional activities, and UCSD has just updated its definitions of in-person reference and informational services. UCI, however, comprehensively restructured reference and instructional statistics definitions and processes in March 1998 in response to launching a centralized digital reference service and to capture more types of instruction statistics. UCI's new, revised reference definitions are based on ARL, IPED and AAHSL definitions and are located at URL:

<http://sun3.lib.uci.edu/~riadm/STATISTC/statdefs.htm>

UCI's new, revised instruction statistics policies, procedures and collection form (IFUS) are located at URL: <http://sun3.lib.uci.edu/~riadm/STATISTC/instruction.htm>

Most UC libraries still need to define and record statistics that reflect our increasing delivery of digital services. Early in the new year UCSD plans to move forward in this area, probably taking an incremental approach rather than a complete overhaul of current approaches to gathering public services statistics. Laine reported that at CDL Rosalie is working to articulate some common statistical measures that vendors should provide to us. Katie reported that Gail Ford, an Admin. Analyst at the Berkeley libraries, is very knowledgeable in this area and willing to collaborate with others, and George commented that Jennifer Sweeney is in a similar situation at the Davis library.

VIII. GIS services in the UC libraries: What trends are we seeing?

Consensus was that the extent to which the population within any of the UC campus communities is interested in making use of Geographic Information Services seems to be tied to the visibility of the service and the responsiveness of those who provide it. The more readily available it is to faculty and students, the more they want to draw on it, especially to try out new forms of research in the social sciences that simply weren't possible to do in this fashion prior to the advent of the GIS-related technologies.

IX. Next meeting?

We'll meet next in April 2000 in the North.

ACTION ITEMS RESULTING FROM THIS MEETING:

1. Cheryl will resurrect the proposal described in item II.C. above.
2. Janice will invite her contact in the Alameda WASC office to the April 2000 HOPS meeting as part of our discussion on whether the UC libraries need to adopt a consistent philosophy and practice in responding to private colleges who want to arrange for their students to have special access to UC library resources.
3. Janice and Susan agreed to draft a proposal for the UC libraries to move into a trial of the project being coordinated by Steve Coffman and Susan McGlamery, using Web technology to try out new approaches to digital reference service.
4. A future HOPS agenda will take up the issue of staffing models in a digital library context.
5. Detrice and Patrick will be HOPS' liaisons to the CDL EWG in planning a workshop for UC libraries' public services staff in 2000 as a forum to support best practices and new ways to conceptualize reference and instructional services and related tools in a digital context.