Heads of Public Services

University of California Libraries HOPS m

Meeting Minutes

December 1, 2000

Room 6113, UC Office of the President

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Oakland, California

Participants: Laine Farley, CDL; Patrick Dawson, LAUC Liaison; Isabel Stirling, Berkeley; George Bynon, Davis; Susan Lessick, Irvine; Laurie Kram (for Janice Koyama), UCLA; Venita Jorgensen, Riverside; Jacqueline Hanson, San Diego (Chair); Gail Persily and Jacqueline Wilson, San Francisco; Marilyn Moody, Santa Barbara; Cheryl Gomez, Santa Cruz.

SUMMARY OF THE MEETING:

I. Review of the evaluation summary of the June 23, 2000 "Best Practices in Instruction and Reference for Digital Resources" workshop held at LAX:

It was noted that feedback on the event, which had been co-sponsored by HOPS and CDL Education Working Group (EWG), was strongly positive. Detrice Bankhead and Patrick Dawson were thanked for their role in planning the event, and Susan Lessick was commended for her role at the podium that day.

II. Quick review of the status of e-reserves on each campus:

Santa Cruz: now doing text reserves; just getting into slides reserves and gradually moving into QuickTime movies.
Davis: Has an e-reserves module; primarily facilitates access to text reserves. Using DRA (Data Research Associates) Software.
Santa Barbara: Mostly doing text reserves; looking into music. San Francisco: No e-reserves yet. May try to build that service off of course Web sites.
Berkeley: Doing e-reserves using E-Res software for 22 courses for Fall term. Audio files are digitized for music in a LAN for the music library and music department. Slides status uncertain.
Riverside: Not yet doing e-reserves, but they've purchased the e-reserves module from Innovative Interfaces.
UCLA: each library handles reserves separately. A few have well-established electronic reserves systems, with a variety of printed, scanned, linked, electronic materials. The Music Library has digital audio for class listening. Some libraries still have only printed lists of reserves materials and only printed materials as well. They are in the process of investigating E-res by Docutek, for management of electronic reserves, hoping it will provide a standardized platform for all UCLA Libraries to use for reserves. They anticipate DRA's reserves module in the coming year; it is reported to integrate with E-res and will manage the hard copy reserve materials.
San Diego: Will launch campuswide text e-reserves service using E-res in January, after several months of planning in the overall context of the Libraries' digital programs. Also currently doing digitized images, digitized music files, and now beginning to study possibilities for offering digitized video files, in part due to dramatic growth in the use of film in undergraduate instruction on campus.

Review of copyright interpretation practices among UC libraries confirmed varying interpretations, highlighting the need for greater awareness and clarity on relevant copyright principles among UC libraries staff focusing on e-reserves (as well as other library services). The Resource Sharing Committee is studying this issue at present and is interested in offering a workshop to UC libraries staff members along these lines. HOPS members expressed interest in collaborating with RSC in planning such an event. Collaboration of the two groups would be responsive to recent advice from SOPAG to groups under its aegis to avoid proliferating workshops in similar time frames.

Action item: V. Jorgenson, I. Stirling and J. Wilson agreed to work on a draft proposal for such an event and then forward it to HOPS members (plus appropriate members of RSC or its subgroups) as a whole for review.

III. Primary discussion topic: Digital Reference Service:

S. Lessick, HOPS liaison to SOPAG, led the discussion. Members briefly reviewed the April 2000 draft report to SOPAG entitled, "UC Collaborative Digital Reference Service." Susan reported that SOPAG had liked the enhanced service aspect of the proposal, especially the opportunity to gather data on user services. SOPAG had discussed staffing implications, sustainable and scalable models, and the desirability of incorporating users' perspectives into the shaping of the service. SOPAG had asked why that group, rather than HOPS, should appoint such a group. S. Lessick had responded that appointment by SOPAG would assure the visibility and legitimacy that such an effort would require, and it would promote a cross-functional approach to the planning process.

HOPS members then discussed related events of the past eight months, one of which was the growing frustration by UC librarians in early attempts to use Webline software in trying out digital reference service. Webline has since been replaced by a product that is more relevant to services, such as libraries, that need to be able to push Web pages to their users from a wide variety of sources. The new, better software is eGain (see eGain.com), which is "chat technology, plus." It has a chat function and pushes Web pages via a feature called Hipbone. It handles forms sharing well, and, at UCI, it works with all layers of the UCI catalog and PubMed.

On 12/18/00 Susan McGlammery, Reference Coordinator of the Metropolitan Cooperative Library System (MCLS), and the leading spokesperson for digital reference services among California libraries, is going to Berkeley to provide a small group of librarians there with eGain training. They are very interested in testing out the eGain software. At Davis, the health sciences librarians are using eGain and hope to have a pilot project in place by January. Santa Barbara and San Diego are very interested in beginning to experiment with some type of digital reference service, not yet defined, this academic year.

HOPS members discussed the importance of separating the concept of digital reference service from the concept of 24x7 service, since the two are not necessarily synonymous but may be assumed to be (mistakenly). Our discussions and plans for trying out digital reference service should focus first and foremost on the "why" of it, that is, what is it that we could do better by virtue of this service, rather than on the logistical details of its implementation.

Discussion then turned to the draft that S. Lesssick had prepared in response to SOPAG's request that HOPS draft a charge that SOPAG might use in appointing a task force to explore the feasibility of developing and implementing a UC-wide digital reference service. The group made various recommendations for revisions to the draft. Action item: S. Lessick, C. Gomez and M. Moody will revise the draft and send it back to all HOPS members for review, after which it will go to SOPAG for their use in next steps.

IV. Review of the ARL LibQUAL+ study and UC libraries' participation in it:

M. Moody led the discussion, describing Santa Barbara's experience in the pilot phase of LibQUAL+, which is a user survey to assess the effectiveness of library services. ARL developed this project in connection with Texas A&M University in 1999-2000. Earlier this year, 12 research libraries participated in this project; Santa Barbara was among them. UC Davis modified the LibQUAL module in order to facilitate their public services administrative unit review. A summary of Davis' findings can be located at: http://www.lib.ucdavis.edu/admininfo/AUR

ARL has received funding from the Department of Education's Fund for the Improvement of Postsecondary Education (FIPSE), and M. Moody suggested that additional UC libraries may want to participate in the next phase, not only for the feedback that each of us would gather about the effectiveness of our services, but also because it could enable us to compare the effectiveness of our services across the UC libraries and to identify best practices. The survey instrument used in the pilot phase of the project was the subject of some concern by participating libraries because of its length and content. Participating libraries must use all the questions, not just some of them, but some customization of the questions can be done.

Action item: Before the next HOPS meeting, we'll all talk with our ULs and colleagues to determine how much interest there is in wider participation.

V. Planning for library staffing in the context of the evolving digital library:

This agenda item was a jumping-off point for a sharing of information/updates from the campuses about how our plans for digital collections and services are affecting our plans for organizational structure and the content of jobs. L. Kram, representing UCLA for J. Koyama, relayed to the group Janice's concerns about professional development for librarians in the areas of conceptualizing digital library projects; up-to-date and appropriate Web tools and creation of dynamic and interactive Web pages; project management; grant proposal writing and outreach communication skills; and the pentetration of information literacy skills and concepts into the curriculum. J. Koyama recommended that LAUC seems like an appropriate group to take a key role in addressing core competencies, around which training and development programs can be built on each campus.

I. Stirling reported that, at Berkeley, incorporation of electronic outreach into instructional/reference positions has made it easier to recruit for those jobs. C. Gomez reported that Santa Cruz has sought to create partnerships between subject librarians and librarians with technical skills for the collaborative creation of content. J. Hanson reported that San Diego has created a position of Senior Associate for Digital Library Program Development, reporting to the University Librarian, and that position chairs the Steering Committee of the Digital Library Initiatives Team. The overall goal of this structure is a broadly based, coordinated approach to planning for digital services so that goals and plans can be spelled out clearly and redundancy of effort can be avoided.

VI. The role of UC Libraries in the Library of California (LOC):

V. Jorgenson, I. Stirling and J. Wilson went to a LOC meeting in Sacramento on October 11, 2000, held to bring together representatives of statewide resource libraries to try to start a dialogue on defining the roles for such libraries with the LOC context. In reality, tangible progress in the overall development of LOC has been modest. G. Bynon noted that the LOC seems seriously underfunded but probably will be with us for a long time because it's so highly

politicized. The LOC model is that libraries join a LOC region, not LOC as a whole. The basic position of all of the UC libraries which have joined or are about to join— Berkeley, Irvine, Davis, UCLA, Santa Barbara, Santa Cruz, Riverside, and San Diego--is that we are participating in LOC in ways that don't detract in any way from service to our primary clientele. L. Farley reminded the group that the UC libraries already are getting from, and giving to, California libraries on a wide basis through two products: the statewide California Periodicals Database, and the"Counting California" project.

VII. Updating our Public Services Statistics:

To follow up on previous HOPS' discussions on the wish to be aware of each others' progress in designing more contemporary and meaningful categories of public services statistics, J. Hanson reported on work underway on this subject at the UCSD Libraries. Using a model of statistics reporting developed at the University of Pennsylvania Libraries to reflect their increasing delivery of services by electronic means, UCSD's public services librarians are trying to identify and agree upon categories that reasonably reflect workload and productivity in the digital arena. Susan Starr, AUL-Sciences, is leading this effort. The goal is to reach agreement on some new categories to reflect productivity for the year 2000, even if those categories may be less than ideal.

VIII. Space Planning in the UC Libraries in the context of Tidal Wave II:

Projections for increased enrollment at the UC campuses vary in their degree of certainty and in their impact on the specific aspects of planning for the use of library spaces across the campuses. Library buildings underway or planned include a small, "mostly virtual" branch at UCSF; an addition to the Biomedical Library at UCSD; and a major addition for the humanities and social sciences library at UCSC. However, general trends relevant to library space planning on all of the campuses are the ever-more-efficient use of existing space, including the use of compact shelving where appropriate, and the goal of making the space as comfortable, inviting and aesthetically pleasing as possible. More and more, the libraries are viewed as community space that provides an important intellectual and social crossroads in the campus.

SUMMARY OF ACTION ITEMS FROM THIS MEETING:

1. V. Jorgenson, I. Stirling and J. Wilson agreed to develop a draft proposal for a possible workshop for UC libraries staff members on copyright issues.
2. S. Lessick, C. Gomez and M. Moody will revise the draft charge to a task force on UC-wide digital reference service.
3. Before our next meeting, all HOPS members will talk with our ULs and colleagues to determine how much interest there is in wider participation in the ARL LibQUAL+ study.

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