

HOPS Meeting April 3 & 4, 2003

Location: UC Santa Barbara Library

Agenda

1. Announcements & welcome to new members

2. Report from Information Literacy CIG (Carol Hughes):

Goal: Advance the incorporation of information literacy into the UC curriculum for lower and upper division undergraduates and graduate students, through collaboration with other groups and through emphasis on information literacy as a vital component of critical thinking skills.

3. Report from the Digital Reference CIG (Isabel Stirling): (from report of CIG chair Joe Barker)

Goal: Advance diverse new methods of delivering services to expand on the foundation of our existing services through such avenues as digital reference service, Web services directed toward PDA users, and integration of Web-based courseware with the libraries' electronic tools.
<http://orpheus.ucsd.edu/cs/drcig/> see pdf file attached.

4. Statistics gathering project at UCLA (Bob Bellanti): anything new to share on the progress of this initiative.

Goal: Advance the need to embrace service quality research methods in a systematic way across the UC libraries so that, for example, all UC librarians will have the skills to put up a Web page or a Web-based survey.

5. A&I transition related to remote access problems (and/or other A& I issues) (Laine Farley):

Goal: Advance awareness of the need for, and support progress toward, more robust remote access to library resources across the UC system.

6. Review draft charge for Web Design Managers CIG, discuss proposal for continuation of this group for SOPAG review. (I. Stirling)

Goal: Advance awareness of the need to embrace Web technology more widely in the promotion of public services by, for example, collaborating with the Resource Sharing Committee and our campus communities to support expanded desktop document delivery services and by monitoring developments in the work of the Access Integration Team. see file attached: [webdesgrpchg.html](#)

7. RSC desktop delivery (?): anything new: same goal as above in #6

8. CDL shift in service model to concept of building blocks, and how this might change approach to delivering web-based public services (Laine Farley: same goal as above in #6)

9. Electronic reserve issues (David Rios) (see prior e-mail from David with attachment/survey)

10. Professional development for public services staff:

HOPS co-sponsored with CDL, and CDL has sponsored or co-sponsored with other ACGs a number of workshops or meetings during the last few years (Usability, Best Practices in Reference and Instruction, Self-Directed Learners, SFX/Open URL, Digital Library Forum, Resource Liaisons - how to work effectively with vendors, how to assess a database, various toolkits, etc. (Also HOPS has sponsored the workshop on Copyright Issues). Can we develop an agenda of issues to address and determine best methods of doing so? How does this fit with the

ULs desire to educate staff on broader issues?

11. Summer Session status: (Jackie Hanson):

Summer Session public services overview sharing. Berkeley, UCLA and Santa Barbara (should) have received the extra package of funds for Summer Session from the Legislature, Davis might be the next in the queue. What difference has the extra funding made in programs or services?

12. CDL agenda item Linking Melvyl-T to local online catalogs on public workstations? (Laine Farley)

When? Concurrent etc., or end of term?

13. Discussion of HOPS goals - need to change anything?

14. Other?

Minutes

April 3, 2002

Present: Isabel Stirling (UCB, chair), Carol Hughes (UCI), Bob Bellanti (UCLA), Donald Barclay (UCM), David Rios (UCR), Jackie Hanson (UCSD), Keir Reavie (UCSF), Marilyn Moody (UCSB), Catherine Soehner (UCSC and LAUC), Laine Farley (CDL) (Recorder April 3, Bob Bellanti; April 4, Laine Farley)

1. Announcements:

1. The LibQual survey will be conducted at UCI, UCSC, and UCD, starting the week of April 7 for three weeks.
2. Melvyl-T goes live to UC library staff today.

2. Report from Information Literacy CIG (Carol Hughes)

The group met in March at UCI (UCM representative Donald Barclay attended via video over the web). They conducted a survey of current activities on all campuses and identified priorities for action which will become part of their report. There was also discussion on the definition of information literacy in conjunction with the LAUC group with recognition that some campuses are already using their own definitions. Esther Grassian and Carol Hughes attended a meeting of the UC Educational Policy Committee recently. This group was interested in consciousness raising about IL but did not feel they could declare systemwide policies.

Next steps: Carol will distribute the minutes soon. The group plans a supplementary survey to determine the scope and scale of instructional and information literacy activities. They hope to have a report for review by HOPS in the summer which would then go to SOPAG.

3. Report from Digital Reference CIG (Isabel Stirling and Donald Barclay)

Isabel distributed a summary of functional requirements and desirable features the group is developing. They plan to invite software vendors to make presentations and hope to have recommendations to HOPS by summer. The goal is not necessarily to recommend one system for all campuses since some have already made a selection. Although a common system would make it easier to exchange questions among campuses, it may also be possible to standardize language to facilitate exchanges.

Action: Donald Barclay agreed to serve as the HOPS liaison and will remind the group to address staffing issues as specified in their charge. If the group can identify key questions, HOPS is prepared to help address solutions.

4. Statistics gathering project at UCLA (Bob Bellanti)

Bob reiterated that the goal was to define common categories for reference queries in order to capture more completely the nature of reference activities at all service points. By July all libraries will be using the online input form which has undergone refinements. Bob distributed samples of reports that are possible now that the data are being captured uniformly. UCLA is still counting according to ARL definitions but is supplementing with their own categories, which are based on the type of service delivered rather than time-based definitions. UCI is also using web-based counting but just for ARL definitions.

Next steps: UCLA may try to link web page hits to categories. HOPS requested that Bob consider making presentations for interested libraries, once in the north and once in the south.

5. A&I transition related to remote access problems (Laine Farley)

With the demise of CDL passwords, some users needed to be directed to proxy servers for remote access. This transition appeared to go relatively smoothly, but some users, particularly in other countries or behind firewalls, still have problems. A larger problem and one that was not fully anticipated by campus librarians was the reliance by many faculty on citation management software (e.g. EndNote) to search databases using the software's Z39.50 client. Once the CDL databases were removed, this method of access became problematic for two reasons: 1) some of the "connection files" used by the software did not exist or were inaccurate for database vendors; and 2) off campus access was not possible through proxies because the Z39.50 protocol is not supported. Many faculty complained about this disruption to their research activities. Regarding problem 1), librarians and CDL staff worked with the citation management software vendor to create or revise connection files for the most popular databases. Regarding problem 2), CDL tested a special proxy that supports Z39.50 and made the information available to LTAG but so far, no one has implemented it. LTAG will be discussing it again soon.

The latest method for supporting remote access is Shibboleth. UC is participating in a pilot project with other universities and several vendors to test this method. Farley participated with Peter Brantley (CDL's new Director of Technology) on a call where various issues related to rolling out the service were discussed. A hybrid environment using both IP addresses and Shibboleth will be the reality for some time to come. One issue was whether public access terminals should always require login via Shibboleth. HOPS members reported that more workstations are being locked down to preserve access for UC users and to a lesser extent because of security concerns. There is still a need to leave some workstations open for public use without requiring logins.

Action: Farley will send individual HOPS members any faculty comments received about these issues as well as resend the notice/explanation of the special Z39.50 proxy.

Minutes
April 4, 2003

6. Update on RSC Desktop Delivery

It appears to be working well. If issues come up we will communicate via the HOPS listserv. This lead into a discussion about communication between various groups, e.g., SOPAG, HOPS, RSC, CAG, etc. We need to ensure that groups are consulting when issues cross boundaries.

7. CDL Shift in Service Model to Concept of Building Blocks....

CDL was initially positioned as the 10th library for digital services, with actual services delivered at the campuses. Issues have come up about who their audience is, how to present CDL on local web sites, the incomplete view of CDL that results, etc. These issues have worsened as campuses are growing their own digital resources.

CDL has redefined its role: it provides an enabling infrastructure and each campus can put the context around it and deliver services locally.

A layered service model is what CDL is developing. Campuses can build pieces on top of the layers they need/want. SFX is a good example of a building block in the layered model approach: CDL provides a central service but fine-tune variations can be made by campuses. Other building blocks include persistent identifiers; shared cataloging; Searchlight; and CDL directory.

Things to do:

OAI harvester

Searchlight2 – need a replacement for Searchlight

Web services – to make the databases more open

CDL is redesigning its web pages – due this summer.

Outcomes – or how does this affect us – issues for HOPS to consider:

New way of thinking

Ability to locally develop services

Ability to conceive the building blocks

Providing a context around services

8. Electronic Reserve Issues

Discussed various issues and how they are being handled on the campuses, e.g., passwording e-reserve sites vs. using IP authentication for access, paying royalties to CCC. San Diego and Berkeley have had one challenge each, both from Harvard Business School Press (related to HBS case studies). These were both resolved without much fanfare. It was noted that the practice of putting up documents on web sites is growing around campuses – going well beyond the libraries. San Diego noted that it conducts regular meetings with other interested/involved parties on campus to help coordinate what is going on and to share issues. Some issues regarding copyright were raised – it was noted that we have a UC UCOP group charged with dealing with copyright. HOPS did some informal polling of issues related to e-reserve copyright issues.

9. Professional Development for Public Services Staff

It was noted that there are resource sharing funds for programs; campuses support travel. Issue: how do we address system-wide collaboration for workshops outside what the national associations offer? Are there areas we want to focus on? We need workshops that focus on broad areas of interest to UC. It was suggested that we query staff to find out what topics are of high interest to them. Some suggestions made at the meeting included: privacy issues (workshop being planned by Library Privacy Liaisons), another best practices in reference and instruction, digital reference (wait until the CIG report is out). HOPS isn't formally proposing any workshops at this time and will wait until SOPAG discusses this issue further.

10. Summer Sessions

Some campuses are receiving additional funding for summer enrollments (Berkeley, Irvine, Los Angeles). There was discussion about how funds were requested by the libraries, how libraries determined how much to request, additional workloads encountered. Berkeley assessed classes offered to see which libraries might be impacted by the offerings. Doe and Moffit were primarily affected with Business and Bioscience affected to a lesser degree. Santa Barbara added some summer hours; got funding to expand security staffing and staff for the Arts library. Some was one-time funding and some was added to their base. They experienced some increase in instruction activity. UCLA received additional funding from the summer school program. There have been some increases in activity. Hours were expanded.

11. Linking Melvyl-T to Local Online Catalogs

Laine asked everyone to report back to her by April 15th with any information on plans for linking to the new version. There was a brief discussion about the timing of this on campuses – whether to cutover immediately or to wait until the spring quarter is over. She noted that legacy Melvyl will be available through August 1st. Melvyl-T has passed the load tests that were specified in the RFP.

12. HOPS Goals

Issue: do we want to change anything? The current goal “Advance the need to embrace service quality research methods in a systematic way across the UC libraries so that, for example, all UC librarians will have the skills to put up a Web page or a Web-based survey” was considered to be overly prescriptive. HOPS agreed to drop the phrase, “...for example, all UC librarians will have the skills to put up a Web page or a Web-bases survey.” HOPS will revisit this again in the fall. Everyone liked having the goals embedded into the agenda as a way to keep them in the forefront. It was suggested that the goal statement should be attached to future agendas in addition to embedding specific goals into the agenda itself.

Next meeting - Friday, September 19, 2003 UC Berkeley

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