HOPS Meeting
April 23, 2007
Oakland , California

Attending: Sherry DeDecker (for Patrick Dawson), Ann Frenkel, Catherine
Friedman, Carol Ann Hughes (chair), Amy Kautzman , Kari Lucas, Ellen
Meltzer (minutes; for Laine Farley), Gail Persily, Sarah Watstein
Absent: Donald Barclay , Laine Farley, Cheryl Gomez, Isabel Stirling

I. UC-eLinks

HOPS made the following decisions: In order to make the interface as simple
as possible for end users, remove the text "Available online" and the boxes
for inputting volumes and dates. Librarians have other tools to track down
items; this tool is aimed primarily for end users. There was overall
enthusiasm for the groupings. Next steps:

- Ask MZT to make the changes
- Send revamped window to HOPS for final review before being
  distributed and to RSC via Gail Persily to keep them in the loop and to
  hear from them if there are any showstoppers.
- After those groups review, send to Users Council with a three week
  turnaround time.
- In the memo, include a link to the UC-eLinks usability report and
  rationale for decisions made.
- For a later round of review: Revisit the issue of the naming of UC-
  eLinks. Many thought the name is unclear and meaningless to users.
  However, don't hold up these changes.

II. Dig Reference Pilot Project

A. Moving QP to Production

- There was consensus to morph the QP pilot to a production service,
  effective fall 2007, increase service visibility (through promotion
  etc.), and continue the service until we have a viable IM alternative
  (vs. suspension of the service). Close behind, we endorsed
  exploration of IM as an alternative mode of delivering chat
  collaboratively.
- HOPS concurred with the CIG proposal to HOPS offer shortened hours
  for the summer, with resumption of evening hours in the fall.
- Due to the time it takes to coordinate, staff, manage the technical
  infrastructure, gather statistics, do training, and other day to day
  management tasks as well to introduce new initiatives, Elaine Adams
  and Ken Furuta recommended that a permanent coordinator
  (100%FTE) for the project be appointed. HOPS discussed the matter
  of % FTE for this work, as well as analogous positions in the UC in
  support of system-wide services/initiatives.

- HOPS felt we could appoint a coordinator (% FTE to be determined) for the QP production service; one component of this individual's responsibilities will be to track QP developments, including intentions and plans re: IM.
- HOPS encourages an enhanced production service (exploring expanded evening and/or weekend hours, publicizing the service, further embedding the service as local opportunities permit, etc.)
- UCSD intends to add more staffing hours.
- Effectively promoting the service is the key to its continuing visibility and success. HOPS agreed with the CIG's recommendation that centralized templates and accompanying boilerplate (for bookmarks, posters, press releases, feature stories etc.) would be of use at individual campuses. Hiring a graphic designer is not feasible at this moment, however, tapping campus resources is. Watstein offered to speak to UCLA's Dawn Setzer, Library Communications, about providing initial design and graphic services to the collaborative service.

B. Evaluation of Current Service

- Survey of staff providing service shows that difficulty of answering questions from another UC campus was about the same as those asked locally, i.e. it was not appreciably harder to answer questions from users at another UC campus; better navigation on all campus public websites would help
- QP has limitations such as slowness of the software.

C. Scope of UC Collaborative Digital Reference

- The scope of the evolving Dig Ref project needs to be defined. Here, the focus was on 1) enhanced QP production service (as we move from pilot to production) and 2) a complementary collaborative IM pilot.
- Let's keep both northern and southern campus Dig Ref initiatives under the same conceptual umbrella. For long-term service credibility and viability, it will be important to add the northern campuses into further pilots/developments.
- UCSF is not currently prepared to answer general reference questions, but wants to gain collaborative chat experience in some way.
- An acknowledged benefit of the collaborative service/pilot is that individual campuses are able to expand their digital reference hours using the collaborative service.

D. Exploring IM

- UC Davis is installing Gaim software in their admin offices.
- IM won't have stats, etc. in a consortial environment; QP includes a transcript of each session, which is very useful; maybe we use a new paradigm for this service and rely more on locally generated statistics tallies; electronic paper trail is important; users want information at

the end of the interaction. However, nimbleness is important as well.

- UCD is interested in IM model; UCSD is currently IMing in Biomed libraries (jabber or others).
- IM-ing can be more personal than straight email reference or QP chat—users often know the person they are contacting.

E. Future Developments of the Collaborative Learning Environment

Progress continues at UCLA towards the adaptation of a single common collaboration and learning environment (CCLE). Campus entities have converged on Moodle as the environment of choice. The Library is currently contributing to the development of implementation plans, and seeks to establish presence in this space. Embedding chat, along with other services, might be one manner of doing so.

ACTIONS:

- Investigate dedicated coordinators for both the production service and IM pilot;
- SW will gather job descriptions for coordinators in other digital reference consortia;
- AF and SW will develop draft JD for UC's coordinators and present back to HOPS;
- Develop a recommendation in support of an IM pilot;
- E. Adams and K. Furuta will develop and "embed" in their final report due in May;
- Prepare to pay for QP next year (CAH will find out costs for next year [Update: The full year for 10 libraries in FY08 will be $7,125or $712.50 per each library if all 10 chip in.]);
- Invite E. Adams and K. Furuta to join our next HOPS conference call after their report is turned in;
- AF will forward librarian participants responses to HOPS; CAH will sound out info about Gaim;
- SW will send out "IM in the UC" collaborative document;
- AF and SW will propose means to formally acknowledge the contributions of Adams and Furuta.

III. Future Public Services Workshop

End of August, early September (right before classes start); have a facilitator; open space technology technique from TAIGA; East Bay Center Foundation Conference Center ; for HOPS and SOPAG and others? ~$2500, plus travel; dinner the night before; 3 public service items to work on as an initiative; have campuses discuss before the meeting; Lorcan Dempsey talks-OCLC environmental scans; life event; share documents in advance; details have to be in place by April 27; HOPS recommends that campuses do prep at campuses for high level, vision, public service meetings; consider SharePoint site or wiki; future of public services and how we can approach at a systemwide level; have high-level IT people there with a clearly defined role

(observers, reactors, or as resource people); have a kick-off person from outside of UC to set the stage to broaden the perspective; what process will be used to decide on three things; need joint reading for HOPS and for staff to all decide what are major issues with shared knowledge; could have a website and have discussions be the same on all campuses; HOPS could have a task group to do that; could have a virtual meeting before hand, or at the meeting

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IV. Mass Digitization FAQ

Michigan MDP pages: http://www.lib.umich.edu/mdp/ There are FAQs linked form this page.

ACTIONS:

- Draft comparing Google and Microsoft—AF will send to HOPS.
- Ann and Carol will work on FAQ for UC librarians.Please send questions via email to HOPS. (Examples: What is meant by mass digitization? When will local links be added into our catalogs?)
- Explore where local collections come in? Link to local information? Or general information to look at campus pages?

V. Updates

A. SCO update: GP: Proposed open access policy has gone out to academic senate; policy of UC would be encouraged to sign over rights to UC Regents to allow the publisher to do this Discussion: Some faculty had objections to this; discussion about how to opt out-3 different ways; UCLA should be opt in, not opt out; waiting period; what resources do you need to put into place? Trying to separate the principle of the policy vs. implementation? What's the carrot for the faculty? Add the addendum, then they don't have to do again for CAP; faculty don't want to argue with publisher, feel it is a threat to their publishing the article; possible to add a new form in employment agreement?

Comments are slated to come back to Academic Council and UCOL by May 20 (may be pushed back)

FAQ for this project: http://osc.universityofcalifornia.edu/openaccesspolicy/oa_policy_faq.html

B. Resource Liaisons Meeting: CAH distributed packets from the meeting.

C. Role of LAUC Rep: 2-year appointment; HOPS chair changes; what does HOPS think LAUC rep's role is? When does LAUC rep bring items to LAUC? A discussion of the role ensued: The liaison can speak for LAUC to HOPS; represents LAUC to HOPS more than vice versa; some form of check and balance; LAUC rep writes a report to LAUC Executive Board for their meetings—now more HOPS meetings; the position was established before

email; information is more open now; Rep should wear the hat of: what would LAUC do?—from a professional perspective (e.g., the impact of IM on rank and file librarians, etc.) how is Kari's report to LAUC different from the minutes? Job role, campus, etc. makes a difference in point of view; role is a mentoring one, a growth opportunity; understand the impact on librarians of roles HOPS is expecting libns to take on; LAUC rep could put items on HOPS agenda; may want a HOPS response on an issue; HOPS can be a resource (example: instructional role of libns) **ACTION**: EJM will insure that Kari can post to HOPS listserv

D. OCLC/BSTF nominee from PS: This discussion was postponed for the moment.

ACTION: Amy will take the request to the Implementation Team that HOPS wants to be involved from the beginning.

E. Z-portal interface user testing: User interface to VDX; implemented at UCSB; fall for UCR; June 1 at UCI; we can make some of the changes with input from staff users; do more in the fall; could do usability at UCSB late summer. Sherry volunteered to help. There are many issues, including how the service is presented on the website. HOPS is interested in exploring whether users would prefer that the interface display about information on ILL items checked out to them could be integrated with the display of their other circulating items.

ACTION: EJM will touch base with assessment team to see if they can do user testing—after the Zportal upgrade. Gail will consult with RSC to see how planning is coming and how urgent usability testing is from their point of view.

F. AUL salaries: Discussed briefly over lunch

G. CNI: Ithaka session on major faculty survey attitudes toward digital information Roger C. Schonfeld "Understanding Uses & Usage" http://www.ithaka.org/research/icolc-spring-meeting/ HOPS may consider inviting him to come to California to do some sessions (Catherine and Laine discussed at CNI)

H. ACTION: Set a date for the May conference call after May 24 th.

Document owner: **Donald A. Barclay**
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