

UC Heads of Public Services Spring Meeting
UC Merced, March 6-7, 2008
(March 6, 12:PM-5PM; March 7, 8:30am-12:00pm)

Attendance: Carol Ann Hughes (Chair, UCI), Donald A. Barclay (UCM), Patrick Dawson (UCSB), Laine Farley (CDL), Ann Frenkel (UCR), Catherine Friedman (UCSD), Amy Kautzman (UCD), Cathy Palmer (LAUC rep, UCI), Gail Persily (UCSF), Isabel Stirling (UCB), Sarah Watstein (UCLA)
Absent: Cheryl Gomez (UCSC)

NOTES

1. UC eLinks governance/feedback/communication discussion

HOPS discussed how best to solicit input from public services for the use cases and the RACI models described in the background documents supplied by CDL. Although Users Council is one communication channel, HOPS felt that UC-eLinks issues are complex and specialized and would benefit from having liaisons who can become experts rather than relying on the generalist approach through Users Council. It was also recognized that the public services liaison needs to work with the technical liaison(s) as a team.

ACTION:

- Farley will send HOPS the current list of people on the LINK-L listserv (some members have already requested that public service members be added)
 - CDL will develop a charge for public services liaisons for UC-eLinks, using the language recently added to the Users Council charge by E. Meltzer; the team aspect will be added and the RACI examples will be provided to all UC-eLinks liaisons. HOPS preferred to call these the UC-eLinks Campus Liaisons.
 - After the charge is revised, HOPS will formally name their liaison(s).
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2. Discussion of the possible creation of a UC-wide "Database of Database"

Laine Farley presented a needs assessment. Donald Barclay presented a comparison between UCB and UCD's lists of databases (which include some electronic resources that aren't exactly databases). About 1/3 of the items in the two lists are exact matches, while many of the non-matching items are free information resources that any campus could take advantage of. There was a general discussion about the benefits that might be gained from a more open, Wiki-like approach to the librarian-side of managing the backend of a systemwide database of databases as well as the possible gains by using social-networking tools on the public-side front end. Other topics covered included the possibility (some say need) for the items in a database of databases to be reliably pulled from a resource such as Melvyl (or other e-resource management tool) and the possibility of acquiring a commercially produced tool with which to create and manage a database of databases.

ACTION:

Laine Farley and Donald Barclay will continue exploring this issue.

3. Update on Metasearch pilot

An update on the discipline-specific portal pilot project was provided by Watstein and Farley. The purpose of this project was to create a Research Resources Service for a particular discipline that

incorporates the CDL Metasearch capabilities and can be a model for services aimed at different disciplines and on multiple campuses. One of the primary challenges facing team members was to configure databases to work with the metasearch program; another, to create a metasearch portal that could be easily and inexpensively configured to new subject areas. In this case, the prospective audience included graduate students and faculty and the subject of the portal was women and U.S. social movements. Watstein provided an overview of the pilot and assessment efforts to date. Pilot challenges as well as preliminary findings on navigation/user friendliness, metasearch results, and portal vs. Google Scholar or native databases were briefly noted. The initial timetable for the project included assessment and report in Phase 4, October – December 2007. The assessment process stalled due to difficulty recruiting further volunteers. The final report is forthcoming.

4. Digital Ref –CIG and “Ask A UC Librarian” report

HOPS reviewed the analysis of the UC Libraries possible participation in OCLC's 24/7 Reference Cooperative prepared by the Digital Reference Common Interest Group (DigRef CIG). HOPS discussed staffing considerations and the issue of systemwide participation. The recent success of Berkeley's participation in the current collaborative was discussed. UCB participating librarians have found the experience very positive; assistance by the CIG, and particularly in the area of training and online aids, a large part of the success. HOPS believes that this particular service is a good fit for the UC and is implementable within our system for the reasons cited by the CIG in its analysis. HOPS also believes that participation in OCLC's 24/7 Reference Cooperative is an example of our commitment to providing a common user experience in action. HOPS does not support our paying the additional 30% to the Cooperative Coverage fee so that UC librarians are not required to provide service to the cooperative.

ACTION:

HOPS accepts the analysis and endorses joining the 24/7 Academic Cooperative at the start of the 2008/09 fiscal year to leverage additional hours of service for our users. HOPS will be sharing the OCLC 24/7 Collaborative report with SOPAG and ULs.

5. IM Taskforce report

HOPS reviewed the updates from the IM Task Force. HOPS agreed with the recommendation to continue with the current collaborative chat and implement Qwidget.

ACTION:

HOPS would like us to continue to monitor advances in IM technology in order to support collaborative services. HOPS liaison to the IM Task Force, Gail Persily, will be speaking the IMTF chair to discuss options for continuing their work..

6. Asian Cooperative Network

HOPS considered a proposal drafted by Hong Cheng, UCLA, with input and assistance from colleagues in major California research libraries, to establish a cooperative reference service network to fulfill advanced level information needs related to Asian studies. HOPS believes the proposal would be strengthened by needs assessment, i.e. evidence that such reference/research needs exist and that such a program is indeed needed. HOPS recommends that needs assessment of some kind be conducted to establish need. In terms of proposal revision, HOPS suggests first, that the proposal be amended to include more detailed information about resource needs, and notes the numerous costs that the proposal fails to adequately

address or delineate, including, for example, program management, overhead, etc. Secondly, HOPS suggests that the proposal be amended to address how the network of CARSN relates to other cooperative services, such as Ask a UC Librarian, and challenges developers to explore why identified needs cannot be addressed through existing services such as Ask a UC Librarian.

ACTION:

In terms of dissemination and discussion, HOPS recommends that once needs assessment has been conducted, the proposal be formally circulated among the UC EAB group for both feedback and buy in, and requests that comments and a revised draft be returned to HOPS for consideration.

(It is noted that the idea for this network first surfaced at a meeting of the East Asian Academic Librarians of California, held at USC in September 2007.)

7. Delivering Content and Services to Mobile Devices

Watstein updated the group as to the status of a proposal to deliver library content and services to mobile devices at UCLA. UL Strong has approved the proposal, however, implementation has been delayed as UCLA awaits movement/decisions on two levels - - state and federal, specifically, UC's efforts to develop a new policy to comply with IRS regulations governing employer-provided cell phones, and possible federal legislation. The environment remains volatile, and until things settle, or until the Library receives guidance as to how to move forward, the UCLA Library will continue to "hold."

8. Next-Generation Melvyl Update

The Implementation Team and OCLC have been actively working with the systems groups of each campus. Every campus has filled out questionnaires and has done the work necessary to connect local ILS/holdings records to WCL.

The Communication Task Force has shared the "Launch Packet" with each campus. Their charge was to prepare documentation that will support each campus in publicizing, explaining, supporting the roll out of the Next-Generation Melvyl.

Included in the Launch Packet are:

- Ten Things Every Campus Should do for the Pilot
- Launch Checklist
- Deployable Search Box URLs
- Project Summary
- Press Release for Campus Media (elevator speech)
- Adaptable Text for Faculty
- Adaptable Text for Graduate Students
- Adaptable Text for Undergrads
- FAQ
- Comparison Chart – Melvyl

On March 17th the lead implementer web sites are going to be up for initial examination by specified groups. Several of the task groups formed for previous work will be called back for a week of intensive testing. This means that the four lead sites (UCD, UCLA, UCSD, and UCB) will have a time period in which our sites are NOT public and scores of UC staff will be working on testing criteria from OCLC and what the task forces themselves have developed. This will give us the information we need to fix bugs or problems, if there are any.

If all goes well the UC date for going live with Next-Generation Melvyl is April 28th.

9. UC Digital Library Workshop on March 14, 08 at UCI

Laine Farley explained that this meeting will be an effort to find out where each campus is with digital library projects (what they are doing, how they are organized, etc.). with the aim of identifying areas/activities that would benefit from cross-campus collaboration and/or central management, and discussion of relevant issues including possible models. Attendees will be: members of SOPAG, members of the Digital Library Services Advisory Group, digital library liaisons from each campus (if appropriate), CDL staff, and an instructional technologist from UCSC.

ACTION:

HOPS asked Laine Farley to see if the HOPS chair can attend to assure public service input and feedback. [Carol Hughes did attend.]

10. Communication with staff on HOPS agenda items

The discussion centered around the idea that HOPS would like to be able to share more information about our activities and reports with our campuses and on the website. We agreed that we will provide more information outwards, in an effort to keep our process as transparent as possible. We will provide enhanced minutes that would be posted on the Web and distributed. We will distribute completed and accepted reports that have been submitted to us by our subcommittees and taskforces. ***HOPS will decide on a document-by-document basis the level of detail and timing of sharing HOPS reports externally.***

11. Next Chair of HOPS

Catherine Friedman was HOPS' unanimous choice as the next chair of HOPS. Catherine will begin her two-year term directly after the spring 08 meeting. Carol Ann Hughes was enthusiastically thanked by all HOPS members present for her leadership and keeping us on track during the past two years.

12. Most Promising Idea Memo

HOPS spent the remaining meeting time writing a draft of a "Most Promising Idea" memo (from our Public Services Charge from SOPAG) which Patrick Dawson forwarded to SOPAG.

Thank you to Donald Barclay, Bruce Miller and all of UC Merced library staff for making our visit comfortable, productive... and delicious!

Document owner: **Donald A. Barclay**

Last reviewed: March 24, 2008