

**UC Libraries/HOPS
Conference Call
June 28, 2012, 3:00-4:30**

Attending: Ellen Meltzer (California Digital Library), Amy Kautzman (Davis), Carol Ann Hughes (Irvine), Kevin Mulroy (Los Angeles), Sara Davidson (Merced), Ann Frenkel (Riverside), Lorna Lueck (Santa Barbara), Greg Careaga (Santa Cruz), Lynn Jones (LAUC)

Guests: Felicia Poe (CDL)

Absent: Elizabeth Cowell (Santa Cruz), Gail Persily (San Francisco), Catherine Friedman (San Diego)

1) Announcements

Starting July 1, Ann will be the UCR SOPAG rep.

UCM local III catalog will be turned off June 29 and operations will be assumed by OCLC Worldshare. Sara predicts that with just one catalog, searching and instruction will be easier for users.

2) Online instruction activities update (if any)

Greg said that the survey of UC instruction librarians will remain open until July 9, and then the group will be working on the report due August 1.

3) Report from ALA 24/7 Questionpoint meeting with Susan McGlamery and Carol Bonnefil (Friday, 6/22/12).

From UC: Cynthia Johnson (I), Teal Smith (Merced), Ken Furuta (R), Tony Aponte (LA), Simon Lee (LA), Lorna Lueck, (SB), Gayatri Singh (SD); Corliss Lee (B), Ellen Meltzer (CDL)

Described other California state Consortia and beyond. More than 2000 libraries in 33 countries participate; discussed changes including an email pilot and a “rearchitecting” of the system in 2014.

Some campuses have QP tied in with their text messaging (UCSD has quite a bit of traffic this way).

QP is talking with Google about putting the Qwidget in Google Scholar. We can have specialized subject queues for groups such as business –possible to market to grad students and faculty. UW staffs QP with library school students and grad students. Besides the UC people and other academic librarians staffing the service, there are also OCLC back up staff who answer questions. QP is getting away from the co-browse feature—nothing works very well/looking at other kinds of screen share features such as video. QP is talking to vendors about linked data that would allow us to look at databases we don’t subscribe to.

4) Continued discussion of Dig Ref report

One of the issues raised by HOPS in the last meeting was pursuing talks with

OCLC about buying our way out of the 75% barrier (75% of the questions coming from UC) needed to assure QP librarian back-up at all times. Lynn contacted OCLC and Susan McGlamery proposed trying a pilot for one year for \$13,267. This cost is based on the premise of a 10% increase in UC use, and they want to see after a year if the increase has been that much or if the formula needs tweaking. QP is very interested in retaining the UC group, so was willing to try something like this with us.

We will move forward with two different but related directions.

a) A small group (Lynn, Ellen and Sara) will work on a proposal that we can forward to SPOAG for consideration by the CoUL regarding establishing a central funding mechanism supporting the infrastructure for the UC digital reference service. The proposal will have these aspects:

- It will describe the recommended infrastructure.
- It will detail the funding needed to support the main infrastructure of the service including the QP licenses, the surcharge for 24/7 support to fund additional QP back-up staffing, service management, and anything else needed that will be necessary for the long-term operation of the service.
- We assume the principle staffing will still be handled by librarians on the campuses, and the campuses will contribute organizational expertise, but we will move away from the model of adding the responsibilities on top of local responsibilities to one where the service and infrastructure is organized and mandated centrally.
- A cost share model will need to be developed (could be based on our Dig Ref current model, or similar to the Tier One model for electronic resources...)
- Ideas from the forthcoming SOPAG report on “Financial Infrastructure in Support of Collaboration” (currently being discussed by CoUL) will likely help focus our proposal.

ACTION: The draft proposal is due to HOPS September 15.

b) In the meantime, HOPS reps will find out if our campuses can fund the amount portion of this staffing surcharge: (10 campuses + CDL) this would be \$1,206.09 each. HOPS would like to take advantage of this pilot opportunity from QuestionPoint in time for the school year.

ACTION: Please respond via by the next meeting (July 26).

5) Central Index and View Now assessment and recommendation (sent on June 27 A.M) (Felicia Poe joined at 3:30)

Felicia reviewed the assessment and the recommendation by the assessment group (Felicia Poe, Jane Lee, John Kupersmith, Lynn Jones and Ken Furuta).

One of the things that Felecia mentioned occurring during the assessment process is that quite a number of students referred to Ask a Librarian as a good place to get help when they are stuck in Melvyl. HOPS endorses the recommendation with the added comment as soon as the Melvyl Operations Team has examined and resolved the issues regarding View Now and the Government Documents, that View Now be turned on for Government Documents electronic links in Melvyl. We will ask that HOPS is kept apprised of this, so we are aware if the Government Documents View Now option is turned on.

ACTION: HOPS should share the assessment and recommendation with our librarians, and Ann will communicate our response to the Melvyl Advisory Group.

6) Update from MAG

Patti Martin got a chance to see the OCLC search tool in development that integrates FirstSearch capabilities into Wordlcat (expert searching as well as novice) and says it looks as if it will resolve many of the searching concerns librarians have regarding Melvyl.

7) Sharing electronically transmitted licensed Tier 1 content with UC patrons through QuestionPoint.

QP librarians were admonished that QP policies DO NOT want us to send digital content from our databases to students at other universities. The question came up if this applied to Tier 1 content. UC librarians felt it was a grey area; some did it, some did not. Some only shared tier 1 content if access is down at a particular campus. The question arose if the ARL best practices for Fair Use provided any guidance for this practice (principle 1: Supporting Teaching and Learning with access to library materials via digital technologies—which usually applies to e-reserves

HOPS reps felt that sharing Tier 1 content should be allowed for all UC users and is fair use, but if another campus does not subscribe to a resource (Tier 2 or 3) the ability to lend (or distribute electronically) depends on the individual licensing, and is much more problematic in terms of fair use.

8) RSC update: the new RSC Liaison to HOPS is Kristine Ferry from UCI. She will be on our mailing list, and will sit in on one of our calls this summer to get introduced and oriented.

9) HOPS Chair hand over to Amy Kautzman!

Document owner: [Greg Careaga](#)