April 6, 2006

To: Bernie Hurley, Chair, SOPAG
From: UC HOPS
Re: Comments on the Bibliographic Services Task Force Report

The following summarizes HOPS' response to SOPAG's request for comments. For details on how we voted and individual comments, see the attached appendix.

In addition to responding to the request for comments, HOPS views the BSTF report as an opportunity to consider more deeply the public service issues that relate to bibliographic services and exploring how the BSTF recommendations would affect the services we offer to our users. HOPS affirms that the new shared digital library environment in which we now find ourselves offers unparalleled opportunities to rethink the design and delivery of public services and this report serves as a good starting point for looking at strategic initiatives in public services not just bibliographic services. For example, will the direction of centralization for bibliographic services force changes, planned and unplanned in the provision of other information services to users? Will there also need to be more integration or other services? Will changes in the design and delivery of bibliographic services force changes in the design and delivery of public services? HOPS sees our task as beginning to address these questions as UC moves forward toward implementation of the report.

Additionally, as the BSTF recommendations move forward and are refined, HOPS believes it has much to contribute to the development of the implementation road maps identified by SOPAG and the ULs as priorities, and we look forward to involvement in these critical "next steps." HOPS is currently preparing a brief document for SOPAG, which will outline the public service issues we view as critical components to the successful implementation of the changes proposed in the BSTF report.

Overall Response

We want to emphasize that the opinions expressed in this response are those of the *individual* members of the UC Heads of Public Services All Campus Group and do not reflect our campus' sentiments. Campus input will come through other channels.

Overall, the members of HOPS applaud the work of the task force and in general, viewed the report very positively. We support the ideas in the report and recognize that the challenges are ahead as we work to define the details and foster the necessary cooperation for implementation.

1. Which 3-5 of these 15 major headings do you think are the most important for UC to address?

    These 3 major headings received the most votes:

        I.1: Provide users with direct access to item   (9 votes)
        I.6: Deliver bibliographic services where the users are   (8 votes)
        II.2: Support searching across the entire bibliographic information space (7 votes)

        HOPS members identified these 3 headings as most important when considering how to help users get to the information they need or desire. Other major headings that also received multiple votes focused on more specific services such as personalization features and relevance ranking. Re-architecting cataloging workflow also received multiple votes.

2. For each of the 3-5 major headings selected above:
   Which of the sub-recommendations do you think should be given the highest priority; that is, which do you think UC should address first and why?

   Based on voting by HOPS members, these sub-recommendations received the most votes:

I.6a:	Integrate with VLE/CMS	(7 votes)
I.1a:	Elinks to logical default	(5 votes)
I.1b:	"I-want-this" button	(4 votes)

   HOPS members felt strongly that bringing BS systems to the place where the users need them, such as Virtual Learning Environments, was extremely important. This is one area where we thought the BSTF report was too library centric and did not take the idea far enough. HOPS advises that in order to be successful, a variety of campus partners are required in this effort. Our votes were split between having UC-eLinks take users to a logical default and the concept of an "I-want-this" button. Many felt that the first option was a stepping stone toward the second option, which is a future, more full-service option. Some HOPS members also indicated strong support for relevance ranking, enabling the user to define sets for searching, and providing result sets by format and other facets. Many supported the concept of a single UC cataloging enterprise. Our appendix includes several comments from HOPS members on the sub-recommendations, some of which disagree with the prevalent views summarized here.

3. Creating a single public catalog interface. Create a single UC OPAC or outsource?

   HOPS members were generally receptive to the idea of a single public catalog interface. Some did express concerns about local branding and one member suggested that a single data repository was a good idea with different skins for each campus.

   HOPS did not feel equipped to make a strong recommendation for a particular strategy. Instead, we focused on the public service issues that a new approach to the catalog raises. HOPS identified the need to create a centralized data store that allows us to build new and customizable discovery tools; HOPS felt that the terms catalog and cataloging were too narrow to describe this new approach to managing our resources. HOPS is interested in the capacity to display information effectively to the public and the potential of this option to facilitate the development of new discovery tools. Some issues of concern include:

   - A one-size public interface will not fit all, even within a single campus. Will any system be able to support customizability for users to effectively build and modify their own "search contexts"?
   - What types of customization should be supported? RSS feeds? Emailing of results? Customizable toolbars? Selection of preferred information resources?
   - How can we build a "reference interview" into the options presented to the user?
   - Will our infrastructure and tools support harvesting, federated searching, or only traditional OPAC searching?

4. Re-architecting cataloging workflow to view UC cataloging as a single enterprise while recognizing that more debate and discussion is needed to identify the appropriate mechanism for implementing such a single enterprise vision. Coordinate, consolidate or outsource cataloging? Where to keep the data – shared central file, single UC ILS, or OCLC?

HOPS members supported the recommendation to re-architect the workflow and view UC cataloging as a single enterprise. As we developed the concept of creating a centralized data store

as described in #3 above, the possibilities for customization and value added services became apparent. HOPS recognizes the challenge of developing a new model for a data store that can go beyond the MARC model to support a range of desired services. Our experience to date demonstrates the range of tradeoffs that are required when making buy vs. build decisions.

HOPS applauds the Task Force for successfully laying the groundwork for a new bibliographic service environment. HOPS looks forward to playing a leadership role in addressing the public service requirements this environment. As indicated above, in addition to this response to SOPAG's RFC, HOPS will be sending SOPAG a short summary of our thoughts regarding how public services concerns dovetail with the BSTF report. We look forward to further action on the recommendations articulated in the BSTF report.