

UCSC BSTF Response

This summary serves as the library response for UCSC and is based on input received in an open meeting for all library employees on Tuesday, March 28th. A majority of the approximately 25 people who attended the meeting were from Public Services, so the comments tended to be more focused on public service concerns.

Prior to the meeting, we mounted a blog with the 15 major headings and asked library staff to rate the priority level of each of the recommendations and choose the 3-5 most important headings. Additionally, the UL asked the group to consider if any of the major headings were ones where Santa Cruz could take a lead, or might try to improve services locally.

QUESTION:

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

The top ranked recommendations are as follows:

1. I.1 Provide users with direct access to item (13 votes)
2. I.5 Offer better navigation of large sets of search results (10 votes)
3. I.6 Deliver bibliographic services where the users are (11 votes)
4. II.2 Support searching across the entire bibliographic information space (9 votes)
5. III.1 Rearchitect cataloging workflow (9 votes)

Here's how the other recommendations were ranked.

6. I.8 Provide better searching for non-Roman materials (5 vote)
7. II.1 Create a single catalog interface for all of UC (5 votes)
8. I.4 Offer alternative actions for failed or suspect searches (4 votes)
9. I.3 Support customization/personalization (3 votes)
10. I.2 Provide recommender features (3 votes)
11. IV: Supporting Continuous Improvement (2 votes)
12. III.4 Automate Metadata Creation (0 votes)
13. III.2. Select the appropriate metadata scheme. (0 votes)
14. III.3 Manually enrich metadata in important areas (0 votes)
15. I.7 Provide relevance ranking and leverage full-text (0 votes)

Specific comments/concerns regarding the top ranked recommendations:

I.1 Provide users with direct access to item (13 votes)

The overwhelming reaction to this recommendation was that users want easy access to the total content of items they're looking for without having to click through various often-confusing menu choices. Working on the reference desk on a daily basis makes it clear how very difficult accessing information from the library's catalog, databases, and web pages is for patrons even with UC eLinks. A library patron not being able to find what they want online can then create a workflow problem for Interlibrary Loan.

- This is a core component of library service, to connect users with the information they need/want. It's important that UC eLinks does this in a clear and intuitive manner.
- UC eLinks is less than intuitive for many users.

- Everyone wants full text. This also seems like something CDL could implement very quickly to improve services almost right away.
- Direct reliable access is very important to our patrons. The language in UC eLinks can be confusing. The systems should be able to find the online publisher with the full text and go to it, without making the patron choose from a list.
- The UC system must pressure publishers to adhere to standards so that users will consistently be able to access full-text without having to go through tables of contents or our local catalogs. Often the articles or titles aren't highlighted in the catalogs or TOCs, so users have a hard time picking them out.
- Patrons tend to now use Google Scholar because they find our tools too difficult to use and Google Scholar brings results right up to them.

I.5 Offer better navigation of large sets of search results (10 votes)

Providing better navigation goes back to metadata. There are no standards that are consistently applied across formats for all types of nontraditional information, which presents a serious challenge. Multiple metadata schemas exist and make it confusing for users if they aren't familiar with them. More collaborative work should ensue to create consistent standards that can provide better searching and results. Once standards are adopted appropriate quality control measures should be employed.

- The faceted browsing in NCSU's catalog is particularly appealing. If we begin to include a broader range of materials in the catalog, we'll also want to give patrons tools for wading through the larger results sets.
- If NCSU and others are doing this, then algorithms must exist to provide the faceted results.

I.6 Deliver bibliographic services where the users are (11 votes)

The Santa Cruz discussion on this heading was more of a local nature including outreach and influencing campus-wide development of services. Participants agreed that more focus and effort should be employed to collaborate with faculty in bringing effective resources to our students and developing closer ties with the campus Information Technology Services. This recommendation has major implications for public services and especially for instruction programs. At the same time:

- UCSC is already doing quite a bit of work incorporating links to library resources on course Web sites.
- Faculty and Instructional Computing provide links to ERes and librarian-created research guides on their course pages on departmental servers and on WebCT.
- Course management systems are being reviewed campus wide and the Library is participating in the conversation.
- The UCSC student portal already has some links to library resources. Communication and cooperation with the campus portal about our presence in their service could/should be improved.

II.2. Support searching across the entire bibliographic information space (9 votes)

Everyone wants this ability, it's the Google results model.

- Studies and best practices should be conducted to discover the best ways to pre-harvest metadata to create better search results.

III.1 Rearchitect cataloging workflow (9 votes)

- This would help with consistency in serials cataloging.
- Of very high priority would be the creation of a single data store
- Some in Technical Services support going to a single ILS; others would like to rely on OCLC as the single UC database of record for bibliographic data.
- UCSC did not support cataloging at one or two centers as there was concern for rush orders and local expertise to take on local initiatives.
- UC should research and determine best practices at other universities (e.g., North Carolina; Maryland)

Additional Questions:

A Single Public Catalog Interface for All of UC

- To be willing to give up our local catalog we would have to be assured that the performance of the new single catalog would be far superior to both our local catalog and Melvyl.
- Should we do it ourselves or outsource it? SC was split on this idea. Some staff believe strongly that we should not go with the usual OPAC vendors but look for alliances (Google or Amazon?) to capitalize on innovation, incorporating mixed materials (video, sound files, etc.) Other staff believe we should do it ourselves because we know the most about what our users want, so we should look for collaborative models across academic institutions that have worked (e.g., Sakai). Still others believe we should outsource the UC OPAC to a commercial vendor.

Cataloging Organizational Options

- Cataloging into one or two centers will cause many workflow problems. It will remove local cataloging expertise from campuses. Services such as rush requests will deteriorate.
- Do not recommend consolidating cataloging into one or two centers. Cataloging would be removed from the selection and acquisitions process, could result in a delay of material, and make local control of cataloging more difficult.

Which Three Architecture Options

- Technical Services staff recommends the adoption of a single ILS. This allows bibliographic, acquisitions, and holding information to be in one place for easy data manipulation and for collection planning activities.
- If a single ILS could not be implemented and a choice had to be made between a central file and an OCLC file, then UC has to evaluate what it wants to achieve.
- Maintaining the integrity of both the central file and the local ILS is vital for its success; else neither file could be trusted.
- If we desire a fast and easy partial solution and are not concerned too much about the integrity and the currency of the OCLC file as our database of records, then we could use that file as the starting point for our aggregated holdings.

Summary

Although the heading “Supporting Continuous Improvement” did not rank high in either the blog responses or the campus meeting, it is worth mentioning that some feel that creating mechanisms to support continuous improvement is the first step in the whole process the BSTF is recommending. In addition to suggestions given in the report, a concentrated study of existing workflows, identifying redundancies, finding best practices, determining which best practices are already shared system-wide, identifying best practices to begin to share across the system and build processes/procedures and work tools that move UC forward on the mutually agreed recommendations from the report should all be employed. Finally, UC should institutionalize the process of continually reassessing and refining the processes we agree to follow.