

University of California

Circulation Heads Meeting - UC Santa Cruz

March 27, 1997

ATTENDEES:

Nancy Beale, UCSD; Norah Foster, UCB; Joan Jefferies-Row, UCI; Joyce

Ford, UCB; Nensi Brailo, UCB; Eric Scott, UCSF; Claudia Jimenez, UCSB; Vince Novoa, UCSC; Todd Boelman, UCD; Meredith Fleming, UCB; Diane Keen, UCR;

Karl Slinkard, UCB; Sharla Desens, UCR, Stan Patrick, UCLA; Lucia McLean, UCD; Stephen Cruz, UCSD; Gary Carlton, UCSC, Carol Boggs, UCR; Sharon Bullard, UCSB.

The meeting was convened at 9:15 a.m. in the Science Library at UC Santa Cruz with a representative from each campus present. Victoria Welborn welcomed the group to the campus and the Science Library and expressed her appreciation for the work of circulation staffs.

Nancy Beale was elected facilitator. It was determined each attendee had a vote, rather than having one vote per campus.

GOALS:

Nancy Beale asked us to review our goals and mission statement to determine if anything needed to be changed since they were written in August, 1995. The general consensus was that they were still applicable, but they would be evaluated throughout the meeting and discussed later. At the end of the meeting an assessment was made and it was determined the current goals are viable and could remain in effect for another year.

The goal of "establishing a more formalized relationship with HOPS" was discussed. Reasons for continuing to meet and to continue to pursue a formalized organization were:

- \* Provides lines of communications between ILL and Circulation as the functions of the two operations are blurring
- \* Promotes the sharing of ideas about automation/technology between people with common interests, such as the 3M Self Check System and electronic reserves
- \* Provides opportunities to explore and be aware of technological advances, such as the implementation of Z39.50
- \* Provides a forum for discussing and gaining experience and insight on common problems and new policies being considered

\* Provides opportunities to share technical information regarding like equipment., such as the functions of the Innovative Interfaces System and DRA

\* Continues to explore ways and refine methods of verifying patron information

**ACTION:** A vote to pursue formal recognition was unanimous and Lucia McLean volunteered to draft a letter to HOPS. In addition to stating our goals and relationship with HOPS, it was suggested components of the letter should \*include: the financial concerns of meeting, the current cooperation by Circulation Heads through e-mail, the list server and the annual and semi- annual meetings held thus far and the fact that model 3 suggested in our first proposal is working.

**CHAIR:**

A decision was made to elect a chair and chair elect at the end of the meeting. The chair would be the liaison with HOPS, serve as a central point for gathering and disseminating information, be a spokesperson for the group, appoint committees and delegate tasks, and facilitate the annual meeting. The chair-elect would serve in the absence of the chair, coordinate the annual meeting including calling for agenda items and formulating the agenda and insuring local arrangements. The term would be for two years serving one year as chair-elect and one as chair.

The annual meeting would continue to rotate, meeting one year in the south and the next in the north.

**ACTION:** At the end of the meeting Sharon Bullard was elected chair for one term and Nancy Beale was elected Vice-Chair/Chair-Elect and will serve two years.

**ROUND ROBIN:**

Vince led a round robin covering topics submitted before the meeting.

**FACULTY SPOUSES:**

What privileges are the spouses of UC faculty given at UC libraries other than their home campus?

B Faculty spouses get faculty privileges

D Tenured faculty spouses get faculty privileges, all others courtesy

I No privileges

LA Courtesy privileges to staff household and 18 or older

R Spouse and child, privileges similar to undergraduate

SD Courtesy privileges to faculty spouse or child over 18

SF Any relative is courtesy borrower

SB Courtesy card

SC Courtesy card

ACTION: Vince will gather data and add it to chart on UC Circulation Borrowing Policies.

#### PROOF OF ENROLLMENT:

What method is used to verify proof of enrollment at other UC campuses when the student's ID does not have a validation sticker?

The Berkeley website

List of phone numbers developed for this purpose on UC Circheads Listserv

ACTION: There is a need to communicate to patrons going to another campus that nights and weekends may not be the best time to try to get a library card at another campus. There is also the need to alert all circulation staff of the procedure to verify enrollment. Work will continue toward the ultimate goal of one source for all UC enrollees.

#### BLOCKING DELINQUENT PATRONS:

If a patron is delinquent with lost or overdue materials from a UC campus other than their own, will the home campus block that patron?

D Yes, if the amount is \$500 or more

LA Before could say yes would have to meet certain conditions

R Block own students with charge due of \$50 or more. Would have to discuss issue of other campuses with own library administration.

SD Yes

SC Does not block their students for similar reasons now. Before they could say yes, they would have to discuss with the UCSC campus administration

SB Yes

Problems would have to be resolved before a procedure could be implemented, such as:

- at what point will the block go into effect

- who will notify the patron that their library privileges are being blocked
- a trigger would have to be in place to notify the responsible library to have the block removed
- if a patron is blocked at their own campus, the campus requesting the block would be responsible for letting the home campus know to remove the block
- a method of notification would have to be agreed upon

By using the fax instead of the phone a paper trail would be provided and "telephone tag" would be eliminated. A standardized form could be adopted to set and remove blocks.

Since, in some instances, a user could go to another campus and receive library privileges, would it be in the best interest of the libraries to notify all campuses?

ACTION: It was agreed a subcommittee should be formed to address this issue. Those volunteering were: Nancy Beale, Joyce Ford, Gary Carlton, Todd Boelman, Stan Patrick, Claudia Jimenez, Joan Jefferies-Row, Carol Boggs

#### ADVANCED TO CANDIDACY/FILING FEE

What privileges are given to graduate students who have paid their filing fee?

B \$25 library card for 6 months. Graduate privileges. Must renew card every six months and must have a letter verifying status each renewal. Renewals limited to 2 years

D \$12.50 per quarter. Graduate privileges. If RA or TA the fee is waived. Must show proof of paying the filing fee. A form is completed that indicates the length of time expected at this status. Status limited to a maximum of two years. Reduced rate of \$10/Q to join Friends of the Library. Courtesy privileges

LA \$6 per quarter. Graduate privileges. Must show proof of paying filing fee

R No fee. Graduate privileges for quarter. Must show proof of paying filing fee

SD Purchase Friends of Library card \$60 per year. Courtesy privileges

SF Same privileges as if were a graduate student, if registered

SB No charge. Must show proof of paying filing fee. No limit on length of time, Faculty privileges

SC Join Friends of the Library for \$25 year or be a member of the Alumni Association. Courtesy privileges

## DIRECT BORROWING

As the result of a consultant's report, a task force has undertaken a study to determine the feasibility of providing direct ILL access to UC users. Ultimately direct borrowing will allow a user to request materials directly from the campus that owns the item and allows the owning campus to send the item directly to the user without the intervention of the borrowing campus' ILL unit. Several assumptions have already been made by the task force:

- Direct borrowing would begin with UC faculty/graduates/staff
- Service would begin with monographs only
- Would include items with a loan period of 7 days or longer that currently circulate
- Items could circulate as long as 90 days on direct borrowing
- Direct borrowed items will be subject to recall
- Would begin with patron --> lending institution --> borrowing institution >patron
- Ultimately would become patron-->lending institution-->patron
- Direct borrowing will have a direct impact on the operations and functions traditionally associated with circulation. These issues include but are not restricted to:

Patron database: Centralized? Where? DLA? One of the campuses? Control?  
Who is responsible for creation? Maintenance? Updating? Standardization?  
Real time update?

How lending library communicates with home campus?

How will abusers of ILL policies be handled between campuses?

Who will be responsible for encouraging the return of materials?

Who will bill for lost/overdue items?

Will direct borrowing affect due date and timely return?

Due dates? Would they differ between schools on quarterly and semester terms?

Restricted items?

Special issues from special libraries, such as medical or law?

Renewal method?

**ACTION:** Recommend to HOPS before 4/7/97 that a subcommittee from UC-CircHeads be included in all further discussions of direct borrowing. The chair of UC-CircHeads will draft letter to HOPS making this recommendation.

APPLICATIONS FOR LIBRARY CARDS PASSED OUT

## LIBRARY SECURITY:

Lucia McLean provided handouts from a Safety/Security Workshop held at UCD and lead a round robin on issues dealing with safety and security.

- Does your library have a Food and Drink Policy? Who enforces the policy?

B Y Security and Circulation staff

D Y Security and limited staff

I Y Public Services staff

LA Y Library Security and Circulation staff

R Rivera Yes, All staff and Lib Security Officers

R Sciences No

SD Y Staff and security guards.

SF Y All staff

SB Y All staff, but mostly Library Security Officers and Circulation

SC Y Circulation. Have student monitors 10 hrs week. Water allowed as long as it is in a closed container

- Who is responsible for closing the building?

B Moffitt Staff

B Main Security

D Security and Circulation

I Security with Circulation staff as backup

LA CSO's

R Circulation

SD SSH Library Security Guards, Branches use circulation staff

SF PSO's with circulation

SB Safety Officers

SC Circulation

- Do any libraries have a video surveillance?

UCLA Main entrance of URL

B EAL Annex, which is in Chancellor's Bldg., Astronomy/Math/Statistics Faculty have keys

ADA:

Gary Carlton conducted a survey of ADA practices at the different campuses

B Each Library has a contact for ADA; May have proxies; if registered student; Student Disability Center; Have some lowered photocopy machines; Will assist if staff, others should make appointment; Equipment in room of Library.

D Lucia will send copy of UCD libraries' practices to Gary; May have proxies; Will make copies; Main - Disability Resource Room with equipment; Off campus users have access to a book reader.

I Most registered thru Disabled Students; May have proxies; Do try to accommodate off-campus users.

LA When person is in line they are helped when their turn comes; Person at the desk is instructed to do whatever needed to meet ADA person's needs; May have proxies; Will page materials from stacks when staffing allows; Will photocopy materials when staffing allows; Special book cart to be used by patron; Similar to a walker with a basket; Reader stations lower; Students with Disabilities office provides additional services.

R Students go thru the Academic Support Center and they have lots of equipment in that office. The Center is not part of library, All other patrons are helped on a case-by-case basis; The Physical Science Building, which does not have a public elevator, has made special accommodation for users in wheel chairs.

SD Must register with Disabled Students; May have proxies; Will accommodate public by appointment only.

SF Will copy as time permits; Help wheelchair students; Will try to accommodate off-campus users, if possible; Very few requests as most of their disabled students are self-sufficient.

SB Room supported by Disabled Students; Have some lower photocopiers; Will page materials; May have proxies.

SC Everything dealing with ADA goes through Gary Carlton; Provide a good deal of equipment including scanners, voice activated terminals and large screen monitors; Will retrieve from stacks; May have proxies; Deliver books to Disability Resource Center; Pagers worn by stack personnel to notify of need to pull materials.

WEB PAGE:

Vince provided a demonstration of the UC-CircHeads' web page and showed aspects of other web sites. Discussion centered around "What's next and where do we want to go?"

**ACTION:** Nancy Beale will continue maintaining the web site with the help of the members of UC-CircHeads. It was agreed to continue to include the organizational goals and provide information pertinent to and of use to circulation, such as contacts, procedures and privileges charts.

Job descriptions and job opportunities will be removed. Draft minutes will appear first on the listserv and after they have been approved by participants of the meeting they would be moved onto the web page.

**ANNOUNCEMENTS:**

3M has agreed to lower the prices to UC campuses by acknowledging buying as a group

Irvine and Davis have self-checkout units

**POLL:**

Nancy Beale conducted a poll in response to the question, "What did you gain or learn today by meeting face to face that could not have gained through e-mail or a conference call." Responses were:

- \* The issues handled were explored in greater depth and some resolved immediately. That could not be done using either of the other two methods
- \* Information was gathered quickly that can be used to reinforce or change a policy
- \* Meeting face to face allowed us to be more comfortable with each other. People who identified themselves as lurkers on e-mail felt they would be more responsive to e-mail discussions or more inclined to contact staff from other campuses directly
- \* There was a much freer flow of information and freedom of expression
- \* People gained a clearer view of who they wanted in leadership roles
- \* Problems at other institutions make ours not look so bad but it also served as a warning of things that could be coming our way
- \* We have a lot of similarities and we also have a lot of differences

**NEXT MEETING:**

To be held at UCSD with a date to be announced later. Typically the meeting is held the Friday of the Spring Break.

**ADJOURNMENT:**



The meeting was adjourned at 3:35 p.m. to the front of the Science Library for a group picture.

Respectfully submitted by Sharon Bullard with help from Diane Keen and Claudia Jimenez