UC-Circulation Heads Annual Meeting
Spring 2001 Meeting
UC SAN FRANCISCO
Friday - April 6, 2001

Attendees: **UCI**: Mimi Upton, **UCSD**: Lydia Ybarra, Nancy Beale, Gina McCollough, Lisa Clark, Diane Eells, Rose Abbott , **UCLA**: Claire Bellanti, Stan Patrick, **SRLF**: Jon Edmondson, **UCSC**: Vince Novoa,
UCSB: Claudia Jimenez, Erik Mills, **UCR**: Sharla Desens, Diane III Keen, Sahra Missaghieh,
UCSF: Andy Panado, Donna Carson, Eric Scott, **UCB**: Peter Soriano, Karl Slinkard, Brian Light, Chanda Beck, Laura Ng, Kim Wu, Ayana Bourgeois, Madalene Rodriguez, Caralee Witteveen-Lane, Bella Shirman,
Alison Altstatt, Lea F. Mascorro, Amy Russell, Michelle Goode, Julie Cain, **UCD**: Lucia MacLean

I. **Introduction and welcome by Karen Butter, UCSF University Librarian/Assistant Vice Chancellor**

II. **Overview of "CDL Request and its future implications for UC Circulation Units" by Keynote Speaker, Karen Butter.**

As the Chair, Request Project Team, Karen presented attendees with a handout outlining the concept of "One University: One Library". Resource sharing for all UC campuses, particularly in the area of Interlibrary Loan (ILL) is the goal of the REQUEST service. A system wide effort is in place to improve delivery via tricor overnight delivery and to establish a set of performance standards for all campuses.

An overview was presented of the activities currently in place:

✓ Shared collections: CDL databases, MELVYL catalog/PE, licensed databases, 'Request'
✓ 'Request' goals: facilitate rapid access to physical materials on all campuses and RLF's (regional library facilities)
✓ 'REQUEST' timeline:

1. phase I in Jan 1999 (monographs) limited to faculty, graduate students, and staff'
2. phase II in Jan 2000(journal articles) limited to faculty, students, and staff (now accepting 20 requests for books and articles per day)
3. Phase III: implement Consortial Borrowing Software.

Claire Bellanti of UCLA discussed the status of desktop delivery at UCSD, UCB, and SRLF. With desktop delivery one is able to scan documents onto a web page, send an email to the patron, and have a PDF document available at the click of a web address/url. This reduces the ILL workload (sending, lending, etc.), is more efficient and will have an impact on Circulation staff. The goal is to integrate into one flow--ILL and Circulation with local procedures used to dictate this integration. Karen Butter

also mentioned 'Request' would result in campus savings of OCLC costs. Benefits of a consortial borrowing system would include integration with campus circulation systems, improved convenience for users, and real-time patron authorization.

III.   Reports from each campus. Information exchange and innovative ideas.

***UCB**:
- ✓ New University Librarian, Tom Leonard (former UCB Professor and Associate Dean of Journalism).
- ✓ New Cal staff and faculty photo i.d.'s without stickers to be used as library cards. Currently developing a way to merge loans from previous cards to new photo IDs.
- ✓ Email notices are due in May 2001.
- ✓ Conducted three availability studies about the collection and how patrons find/not find materials. Concluded that 60% of materials are found.
- ✓ Chemistry is moving back to their building in Dec 2001 having been in the Doe core for 1.5 years due to seismic work.
- ✓ New web form for patrons to give feedback to the Library located at http://www.lib.berkeley.edu/Improve/ or improve@library.berkeley.edu.

***UCR**:
- ✓ Rivera Library renovation is almost completed with an anticipated move date after June 2001.
- ✓ Currently using wireless technology for an inventory & bar-coding project.
- ✓ Two self-checkout machines, "CODECO" from Canada (not 3M). There is no maintenance contract since their system office can handle the problem, saving $3K/year.

***UCSB**:
- ✓ Difficulties in training staff in Ex Libris for circulation.
- ✓ Including photo Id's in patron records.
- ✓ Opened Friday and Saturday evenings for one year. Planning to extend hours in the summer but experiencing trouble attracting faculty to teach summer classes.
- ✓ New building in ~10 years.

***UCD**:
- ✓ RFP process underway which will pull all existing systems together.
- ✓ Recruiting for head Librarian.
- ✓ Increased hours on Saturday until 1 or 2am.
- ✓ Installed a number of wireless ports to connect laptops.

*UCLA:
- ✓ New system hopefully in 1.5 years. Sent the first batch of bills in 1.5 years, amounting to 15K overdues/bills (mostly generated from SRLF); 80% were returned.
- ✓ Offering more services online including patron initiated recalls.
- ✓ Email notices by Fall 2001.
- ✓ Electronic reserves.

✓ Rewired for laptops, wireless access being implemented, and getting circulating laptops.

*UCSD:
✓ New Department Head/AUL Jackie Hansen.
✓ Preparing for Tidal Wave II with longer hours in Soc/Sci/Hum for summer.
✓ E-Reserves in library.
✓ Small summer remodeling in July 2001.
✓ Wireless technology being supported as a campus effort.

*UCI:
✓ Allow food and drink in the Study Center, approved by UL and Chancellor. Appears to be successful.
✓ AUL searches in Technical Services and Access Services.
✓ Increased hours to 3AM in Study Center and 24-hours during finals.
✓ Wireless access in academic computing.

*SRLF:
✓ Offering more services online including patron initiated recalls.
✓ Working on Phase III due to lack of space. For one year, no requests to store were accepted. Currently starting to process material again although it is taking longer time to process materials.
✓ Processing of new material taking longer than previously.
✓ Working on a few library moves. Inventory control in progress.

*UCSF:
✓ New E-Reserves in Fall.
✓ In coordination with the Student Relations Office and the Parking & Transportation Office, began offering discounted parking fees during 4:45pm-8:00am (M-F), and Weekends. $1 per park.
✓ Pilot project, budgeted for 21K to provide 5 laptops in July 2001 available at Circulation.

*UCSC:
✓ New organizational structure for McHenry.
✓ Maps moved to the Science Library.
✓ Lost and found issues.
✓ Year round institution to begin summer 2002.
✓ E-Res 4.0 upgrade to include free printing.
✓ Taskforce for summer student employment.
✓ Six circulating laptops in place.

IV.   **Policy on access to University of California Library Collections by External Users and the University of California. How does each campus interpret and implement this policy**

Nancy Beale briefly described the third assignment given by the Resource Sharing Committee.   The goal of this assignment will be to compare the privileges we offer to the External Users at each campus. The CAG representative from each campus will be responsible for completing the Excel spreadsheet.

V.   Further reports from Circulation Advisory Group on RSC Assignments

Project #1 (Blocking Patrons at Home Campuses):
- ✓ Andy Panado, Chair, thanked the other sub-team members---Sharla Desens (UCR), Diane Keen (UCR), Lucia MacLean (UCD), Jon Edmondson (SRFL), Vince Novoa (UCSC), and Claire Bellanti (as the resource person, YRL).
- ✓ Andy reported that a proposal was sent to RSC on time. The proposal consisted of 2 main sections with differing deadlines. The 1st deadline of 02/28/01 will entail further discussion (and perhaps agreement) among UC campuses who will be the contact person from each campus. The billing contact will be downloaded and updated via the UC CircHeads web page. The 2nd deadline of 06/30/01 will entail a more in-depth investigation of each campus' environment and capability to achieve our goal of efficient, shared tool about problem patrons. We hope to seek out and investigate a more automated system that will be the answer to our primary objective.
- ✓ Andy also reported that RSC has reviewed and gave some recommendations to redo the proposal. Based on these recommended changes, the sub-team members will again discuss the entire proposal. Some of these changes will reflect the RSC's concern that there are varying ways that each campus handle problem patrons---one campus may be able to do extensive action on a specific patron, while another may not.   Claire has also mentioned that the team should be working on a possible wording/phrases that can be placed on the campuses' lending codes and websites.

Project #2 (Best Practices Workshop – Circulation):
- ✓ Stan Patrick reported that he had put out a call for additional input/feedback on the workshop. He received several comments with some of the following recommendations: dealing with difficult patrons, effective use of student assistants, changing roles of Circulation, impact of electronic journals, and level of training of personnel
- ✓ Recommendations from RSC came in. There should be a collective (one) meeting with regional workshops. An umbrella theme should be instituted due to the changing roles of Circulation. Keeping track of personnel, e-reserves, etc. A better definition of best practices. There was also discussion on whether or not shelving/stacks is part of Circulation. In some libraries, this area is an independent of Circulation Unit.
- ✓ Steps that will be taken will include meeting again and addressing all of RSC suggestions/recommendations.
- ✓ There were some discussion on changing name to Access Services in light of question whether stacks or reserves is part of Circulation. Reserves are integral part of Circulation in some libraries, but they are also separate entities in others and also separated between the main and branch libraries. There are also questions posed by Stephen Cruz (UCSD) how to best incorporate these variances into our services and the differing educational needs required by our patrons. Claire Bellanti (YRL) also asked how we are to implement with changes in regards to ILL?

VI. Breakout Sessions

#1 – Facilitated by Gina McCollough, UCSD (Session 1 Notes)
Questions: With outside sources paying higher wages, it is becoming harder to recruit and keep good student employees. This session focused on techniques, strategies, and other tips on retaining student work force.

- ✓ **Notes:** Please see additional attachment provided by G. McCollough.
- ✓ There was a round-robin session where in each UC representative indicated the going pay rates for their students.
- ✓ The other part of this session focused on the varying and innovative perks and other incentives used by each Library to retain their students.

#2 – Facilitated by Claudia Jimenez, UCSB (Session 2 Notes)
Questions: Training of Circulation Student Employees—What is too much & too little? Are there standards across the board we should all strive for? What if your desk provides reference help, what are your limits on students giving help? Share training checklists.

- ✓ Claire gave everyone a questionnaire for everyone to fill out and return to her.
- ✓ **Notes:** Please see attached questionnaire provided by C. Jimenez.
- ✓ There were various questions that arose. Lucia from UCD asked what students do during slow periods—at UCB, they do shelfreading, but there appears to be a number of libraries where reading textbooks or websuring is allowed as long as primary task are taken care of.
- ✓ Some training checklists were passed around as samples. Tests are also given to some students (for example, 4 or 5 quizzes are given at UCD) to ensure that they have learned skills/knowledge required to maintain tasks.
- ✓ Probations for students also vary---at UCD, there usually is a 1 year probation and with UCLA, it's quarterly.

VII. Library Conduct Policies - facilitated by Lucia MacLean, UCD

Questions: How are libraries dealing with these issues? Is there consistency throughout the UC Libraries:

Notes: These notes are a combination of notes from Lucia MacLean and Andy Panado.

*UCLA:
- ✓ At YRL Library, the Conduct Policy was kept in an emergency manual and is not currently being used. There are no plans to resurrect the policy. At College, the rules are posted in a staff area. They allow drinks in special library mugs. They confiscate any food and drink left unattended. Police will respond to remove people; they are very responsive.

*UCSB:
- ✓ Currently in draft

*UCD:
Currently in proposal stage

*UCSD:
- ✓ The campus attorney reviewed and took out references to code sections. The policy is posted on a bulletin board. The conduct code is used to train security guards. All circulation managers took guard training last year. Nearly all UCSD Circulation staff have done Citizen's Arrests.   They have very good relation with the campus police.

*UCB:
- ✓ Updated their policy in May. It's published on the Web but they keep copies at the service desk when there's a problem.

*UCR:
- ✓ Their policy is posted (sorry, that's all the info I had)

*UCI:
- ✓ Library Facilities are responsible for security. They call the police if there's a problem. The conduct policy is in draft form.

*UCSF:
- ✓ UCSF Library has a written Conduct Policy that was revised back in 05/97. It is a collection of various legal regulations that pertain to Library use.

*UCSC:
- ✓ Library Administration will decide what action to take after an Incident Report is filed. Their conduct policy is published in a brochure.

Several Circulation Supervisors passed out copies of their Library Conduct Polices. There were also some discussions whether or not Libraries are allowed to take away food/drinks when they are left unattended by patrons.

VIII. UC Circulation Head Web Pages - facilitated by Vince Novoa, UCSC

Vince showed the group the revamped UC CircHeads Webpage (http://library.ucsc.edu/uc-circ/)
He requested for additional input and feedback. Everyone is pleased with the look of the page.

IX. UC Circulation Head Elections for Chair-Elect - facilitated by Vince Novoa, UCSC

Stan Patrick, UCLA, has agreed to be the Chair-Elect effective this year.

X. Conclusion and information on our next meeting for 2002.

The next UC CircHeads Meeting will be held at UC, Irvine.