

UC Circheads Meeting – March 24, 2005

Attendees: Jon Bareford - UCI, Carol Bryan - UCR, Felicia Bryan - UCD, Jennifer Carter – UCSC, Lars Cederquist - UCD, Marlayna Christensen - UCSD, Lisa Clark - UCSD, Ferol Conklin – UCB, Sharla Desens - UCR, Jon Edmondson - SRLF, Colleen Evans - UCD, Katica Got - UCD, Ann Harlow - UCR, Marianne Hawkins - UCD, Gail Nichols - UCD, Claudia Jiménez - UCSB, Chela Lucas - UCSC, Lucia MacLean - UCSC, Gina McCollough - UCSD, Jack Neves - UCSD, Vince Novoa - UCSC, Luisa Orlando – UCSC, Molly Ostrander - UCSC, Andy Panado - UCSF, Valerie Rom-Hawkins - UCLA, Sandy Schmidt - UCSC, Jason Schulz – UCSD, Eric Scott - UCM, Don Sloane - UCLA, Peter Soriano - UCB, Josephine Stovall – UCSC, Jonathan Thomas - UCB, Sylvia Villa - UCD, Jeff Williams - UCSD, Dimitri Xavier - UCSB

I. Morning Session:

A. Introduction – Claudia Jiménez, UCSB – Acting Chair, UC Circheads

- There will be no welcome by Acting University Librarian, Bob White, and the meeting will proceed to the report from CAG.

B. Report from CAG – Claudia Jiménez, UCSB – Chair, CAG

1. CAG's website has been updated and is now compliant with SOPAG's guidelines. The website now includes information on how to verify the status of both student enrollment and faculty & staff employment. The External Users report has been posted to website. The current webpage coordinator, Dimitri Xavier, will be leaving UCSB. Jack Neves from UCSD volunteered to take his place.
2. CAG's goals for next year are as follows:
 - Continue to maintain current contact information
 - Continue to update policy information
 - Complete Circulation section of Resource Sharing Code
 - Hold more in depth workshops on specific issues
3. The new chair of CAG/UC Circheads will be Jonathan Thomas, UCB. Marianne Hawkins, UCD has been chosen as chair-elect. Next year's meeting will be held at UCSB. Beginning next year, the responsibility of taking minutes at the meeting will be rotated through each of the campuses.
4. All attendees were asked to complete Evaluation form for this years' meeting in order to assess the value of the Circheads meeting

C. Introduction of Attendees and Reports of Campus News:

1. UCB – Jonathan Thomas, Head of Circulation, Doe/Moffitt Library

- The library hiring freeze has been lifted and both professional and non-professional positions are beginning to be posted.
- The library has two AUL searches going on. An AUL for Doe/Moffitt Libraries and Instructional Initiatives and an AUL for collections have been posted. Patricia Iannuzzi the former AUL for Doe/Moffitt has left to become dean of libraries at UNLV. Alan Ritch, the former AUL for Collections, retired two years ago and the library has decided to fill his position.
- The library has a new photocopy contract. The contract with Xerox expired in August of 2004 and after a bidding process the contract was awarded to Canon. Because of the fall off in photocopying, the number of copiers has been reduced from 90+ to about 60. The new copiers are combination copier/printers. They are being used in some library units for printing as well a copying.
- The library offered a Staff Incentive Program last fiscal year that offered employees who were vested in the UC retirement program the opportunity to receive a cash payout if they were interested in leaving the library's service. The library lost twenty-seven staff members to the program.
- The reserves function in the library moved from technical services to inter-library borrowing. The library plans to move toward eliminating as much photocopying of articles and book chapters as possible and making reserve material available electronically. Because the inter-library borrowing unit has experience in scanning and document delivery, it is thought they would be the unit best equipped for this transition.
- The library has set aside five hundred thousand dollars to begin the process of replacing GLADIS with an integrated library system. The campus is expected to provide another five hundred thousand to fill out the one million needed to proceed with the RFP.
- A seismic retrofit of the Doe Library annex will begin this summer. This means the entire Bancroft Library collection will have to be moved from the building. The bulk of the Bancroft collection is to be shelved at NRLF. There will be a reference collection located with Bancroft public services staff in their new location. Bancroft staff is being moved to a building on Allson Street in downtown Berkeley. Other units that will be affected include the Systems Office which is moving to Evans Hall; Library Administration is also being moved to Evans Hall; the Regional Oral History Office has moved to a location in downtown Berkeley; the periodical collection is being moved to the second floor of Doe Library; and the newspaper/microform collection is being moved into the central core of Doe Library.
- NRLF phase III is to open in mid-April. Doe Library has not stored material at NRLF for the past five years. We will be able to store at our normal numbers of 60,000+ volumes a year.

2. UCD – Marianne Hawkins, Head of Circulation Services, Shields Library

- The Medical Center in Sacramento has broken ground for the new Education Building, which will house the Medical Center Library.
- The Libraries have migrated to v.16 of Aleph over the Christmas holidays, and will migrate to v.17 this summer.
- All positions are filled; there has been no budget or staffing reductions in Circulation.
- There is a continuing decline in in-house journal use, while building use is constant and out of building circulation is steady. The Library hours have remained constant.
- The Libraries continue to streamline procedures as a result of migration to an integrated library system.
- There is a continued shift in student hours from Stacks services to Interlibrary Loan, due to increases in that service.
- The search for an AUL for Administrative Services is in its' second round; there is a recruitment for a new librarian position at the Physical Sciences & Engineering Library.
- There has been no staff hiring freeze.

3. UCI – John Bareford, Circulation Coordinator, Langston Library

- The UCI Libraries have been moving towards an entirely E-Reserves operation. Only a few items are currently available in hard copy. Since Reserves services have combined with the Circulation Desk, this move has helped reduce the lines at the Circ/Reserves Desk.
- Discontinuing stamping due dates at the Circulation Desk to further help reduce lines, is also being considered.
- There have been discussions on raising the maximum fines for Reserves.
- The student center is closing for two years and library administration is looking at increasing our hours to compensate for reduction of available student study space.

4. UCLA – Don Sloane, Head of Access Services Department, Young Research Library

- UCLA libraries have implemented their new ILS, Voyager in just nine months.
- Two new AUL have been recruited and began in March: Sarah Watstein is the new AUL for Research & Instructional Services and Susan Parker is the Deputy Librarian and CEO.

- There has been a permanent, but mild 2% budget cut to the UCLA Libraries. Over 100 positions within the UCLA Libraries have been cut since the 1990's.
- In January 2005, recall and long-term reserve (one day and longer) fines were raised to \$5 per day up to a maximum of \$50 per item. Hourly reserve fines were raised to \$5 per hour up to a maximum of \$50.
- Unpaid fees and fines are being referred to a campus collection agency. More than \$100,000 has been collected in the past 9 months.
- The Library is participating again in LibQual, an assessment survey to evaluate users perceptions of library services and collections.
- Staff in the Research Library conducted a survey this past year to collect data on why patrons were unable to find items in the stacks. More than 400 users were approached as they left the stacks and asked if they found everything they were looking for. 65% of the users said yes, 35% said no. When following up on the items that users said they could not find, 75% of the items were either checked out, missing, owned by another library, not owned by the library at all, shelved in another area, or were on the shelf.

5. UCM – Eric Scott, Head of Access Services, UC Merced Library

- The UC Merced campus will open this September.
- The Library will move into its new location in late June.
- There are currently recruitments for five librarian positions, including two instructional librarians, and two staff positions (AA & LA). In addition, it is expected that three LAIII positions will be hired within the next few months.
- The Merced Library currently had shelving for 250,000 volumes and its current collection is estimated to be about 30,000 volumes.
- The Library will utilize RFID with its ILS and will have self check- out stations.
- Laptops will be loaned out of the circulation desk to UC Merced students, staff and faculty.
- Reserves will be provided in an entirely digital format.

6. UCSD – Jason Schulz, Head of Circulation Services, Social Sciences & Humanities Library.

- Social Sciences & Humanities Library is currently comparing two models of self-check machines for purchase. Both 3M and Checkpoint have provided self-check machines for a trial usage period of two weeks.
- There is an investigation into the elimination of overdue fines assessed on materials borrowed through The Circuit - the lending consortium between UCSD, SDSU, CSUSM and University of San Diego.
- The UCSD Libraries have eliminated the waiver of confidentiality, on all signature/registration forms, to ensure patron privacy. The current

movement is to eliminate signature forms for all UCSD affiliates. UCSD students do not need to complete any registration forms to utilize the library; their library cards are active from the point of registration with the university.

- UCSD Faculty and Staff are now downloaded into the library's system, but the file does not currently contain address information. Later upgrades to the system should allow for the downloading of faculty and staff's campus addresses and phone numbers.
 - Campus email addresses are downloaded into all UCSD student library accounts and is the only method of communication for library notices. All library card holders with a valid email address in their accounts now receive a courtesy pre-due date notice.
 - The Social Sciences & Humanities Library no longer stamps due dates in materials checked out at its Circulation Desk. Receipts are not provided and patrons are referred to the "View Your Patron Record" feature with the ROGER catalogue to check the status of their items.
 - The Biomedical Library has begun its extensive renovation project and has temporarily relocated to the first floor of Geisel Library facility.
 - The Science & Engineering and Social Sciences & Humanities Libraries have jointly purchased pagers (similar to those used in restaurants) to page students when reserve items are returned to the circulation desks.
 - The Geisel Library facility is now open until 2:00am beginning the Saturday before Finals Week thru the Thursday of Finals Week to accommodate the need for student study space during the evening hours.
 - Catherine Friedman is the new AUL for Public Services.
7. UCR – Ann Harlow, Interim Head of Access Services, Science Library
- UCR continues to see growth on campus with an enrollment of 17,000+ this year.
 - The UCR Libraries are currently recruiting for three AUL positions, including the AUL for Public Services and Information.
 - Diane Keen's position, Head of Access Services in the Science Library is being filled with an interim (Ann Harlow) and Loes Knutson retired in March. Neither position will be filled until the AUL for Public Services is hired.
 - UCR Libraries had severe budget cut in the GA money this year, however there are still plans to implement three new services in Access Services: Link+, graduate study carrels and the circulation laptops in the library. In the fall, the UCR Libraries will be requiring students use their campus email accounts to receive email messages from the library. The emails will be obtained via downloads from campus. Courtesy notices will then be sent to undergrads along with the grads, staff and faculty.
 - The Media Library on campus was taken over by the Library and will begin cataloging the items held there.

- Science Library has combined Circulation and Reserves under one Unit Head this last year and Rivera Library has begun cross training staff in both those units.

8. UCSF – Andy Panado, Access Services Supervisor, UCSF Library

- There currently is an opening for Night/Weekend Services Coordinator (Analyst II). Reserves Assistant has announced her retirement effective May 1, 2005.
- Due to budget cuts, library has been involved in a couple of extensive use studies. The Journal Use Study has provided usage information to management. In 2004, approximately 400 print titles were cancelled due to low usage and because they are available electronically. The library expects to cancel more titles this year. The Library is also doing a Building Use Study to assess how patrons are utilizing library space. See also: <http://www.library.ucsf.edu/collres/scipub/cancel.html>)
- Both lending and borrowing modules of VDX have been implemented at UCSF Library with no major problems.
- To minimize lines at front desk during rush periods, and also to minimize staff work, we hope to begin downloading student records from the registrars' database into our circulation system.
- Mission Bay (<http://pub.ucsf.edu/missionbay/>): A 43-acre life sciences campus for teaching and research located off campus is continually expanding. The community center, which will contain a library, is slated to open in September 2005.

9. UCSB – Claudia Jiménez, Head of Circulation Services, Davidson Library

- The Circulation/Reserve Desk is now circulating current periodicals. This responsibility began in Fall 2004.
- The first year of video check out has just been completed. An inventory program is planned over the summer to see if losses are any greater than when videos were in a more secure area.
- The UCSB Libraries are preparing for the upgrade to a new version of the library software, Ex Libris – Aleph version 16.
- The Library is seeking a new vendor for photocopiers.
- Positions have been filled as needed, but several staff and student positions have been lost due to the merger of the Circulation and Reserve desks.
- A campus email address is now required for all UCSB students.
- Some graduate carrels are now being circulated for one day at a time.

10. UCSC – Lucia MacLean, Head of Circulation, McHenry Library

- The UCSC Libraries have taken over the billing of library patrons from campus. The Billing Department is now part of Library Administration.

Students may pay fines directly at the Circulation Desk. Currently, Visa and MasterCard are accepted and programs such as E-commerce, Verisign and PayPal will be on-line shortly. The campus is continuing to act as a collection agency.

- UCSC library accounts are blocked for non-payment of fees: students and public have a limit of \$25.00, while staff and faculty have a limit of \$50.00.
- Pre-due date notices are now being sent and it has resulted in fewer overdue fines and bills.
- Both UCSC Libraries have receipt printers. The Science & Engineering Library continues to give receipts to patrons; however the McHenry Library is considering discontinuing the service. Library materials are no longer stamped with due dates, with the exception of reserve materials.
- The McHenry Library will be moving due to the construction of an addition to its current building. Over 40,000 volumes will need to be moved during the process. The Circulation Desk will now provide combined services for Circulation, Reserves and ILL. The Reserve and ILL units have had their staff permanently combined.
- The search for a new University Librarian continues.
- All UCSC Libraries now have wireless access
- The booking module within the Millennium ILS is being used for Library Reserves.
- To promote library usage, the Science & Engineering Library is presenting the Synergy Lecture Series, where faculty members discuss areas of their research.
- There are currently two issues that staff are currently addressing with library administration: Allowance of food and drink and the ability to bill faculty and staff.

11. SRLF – John Edmondson, Supervisor for Public Services

- Claire Bellanti has resigned her position at SRLF to become the Director of Financial and Enterprise Services for UCLA.
- There is a newly constructed Conservation lab for book repair in the SRLF.
- SRLF will be housing all of the physical journals as part of the JSTOR project. A new librarian has been hired to review the submitted journals for completeness, which is expected to take two years.
- SRLF is reaching capacity in some stack levels, which will be full in the next 2-3 years. Overall space planning and the projected fill dates will be reviewed this summer.

D. RESERVES / ERESERVES WORKSHOP – Marlayna Christensen (UCSD), Valerie Rom-Hawkins (UCLA), Dimitri Xavier (UCSB)

1. Reserve Pagers – Marlayna Christensen, Director of Access Services, Social Sciences & Humanities Library

The concept of using pagers to alert students of returned reserves items was first discussed at the UC Circheads Meeting in March of 2004. Staff from two UCSD Libraries, Science & Engineering and the Social Sciences & Humanities Libraries, formed a committee to determine if using pagers in this manner was feasible. Several companies were contacted and their products were tested within the Geisel Library building. In April of 2004, the committee selected Long Range Systems to provide pagers for the two libraries.

Each library purchased 15 pagers with custom labels, a charging plate, a transmitter and a repeater at a cost of \$1250.00. The pagers were so successful, that additional pagers were needed. The Social Sciences & Humanities Library purchased another 15 pagers (with custom labels) and another charging plate for an additional \$500.00.

When a student inquires about a reserve item that is currently checked out, they are given the option to check out a reserves pager. The student must remain in the library while waiting for the item, as the pager does not work outside of the building. The pager is checked out to the student's account. It does not accrue overdue fees; if the pager is not returned, a bill will be sent to the student for the actual replacement cost of the pager. The pager number and the call number of the reserve item are annotated on a white board at the circulation desk. The board is within viewing range of most of the circulation desk stations, so that staff can easily refer to it as reserves items are returned. When a reserve item is returned, the pager is activated when its number is entered into the transmitter. The student then has 15 minutes to respond to the page. If the student does not respond within this period, they are removed from the board. The next person waiting for the item is then paged, or the item is returned to shelf.

What the library staff has learned:

- Pagers beep (rather than buzz) when out of range of the repeater or when they need to be charged. It is important to ensure that the pagers are being properly charged. Pagers taken out of range will run out of charge more quickly
- Fifteen pagers were NOT enough for a large, reserves collection. The Social Sciences & Humanities Library holds the majority of the undergraduate reserves and with textbooks prices increasing, more students are utilizing the libraries copies of required textbooks.
- Pagers need to recharge, so buy an extra charging pad.
- Students will find a way to work any system that the library



ReservePagers_11.p
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II. AFTERNOON SESSION

A. STACKS WORKSHOP – Lisa Clark (UCSD), Don Sloane (UCLA), Jonathan Thomas (UCB)

1. MAINTENANCE (L. Clark):

- Lisa Clark distributed spiral bound copies of procedures gathered from each campus.
- Most have written procedures that include checklist, basic training manual, student orientation, and UCSB has maps/locations
- Student employment expectations
- UCR has simple explanations
- Basic training of LOC system
- UCLA has assessment test
- Problems: procedures should also have resources when students have questions
- UCSD has three preservation videos: (1) Handling books in General Collections, (2) Cleaning Library stacks, and (3) Preservation Orientation for Library staff.
- See: <http://orpheus.ucsd.edu/preservation/pvideo.html>
- Video (Cleaning Library stacks) was shown.

2. SHELFREADING (J. Thomas):

- Jonathan Thomas distributed copies of handout with stacks layouts and shelfreading procedure (or also called “Fine Ordering”).
- A former library staff member, Sky Ziegler, got the systems office to produce a stacks layout that has highest circulation and broken down into 300 main areas. Shelf reading was then done on the basis of which areas had the highest circulation activity.
- Procedure:
 - Students worked in pairs reading facing ranges.
 - All shelving errors which were more than a two shelves away from their correct location were brought to circulation and checked to see if they were being searched or listed as missing
 - They filled out error sheets to determine which areas had more errors and therefore required more frequent shelf reading than others.
 - The error sheets and major shelving errors gave the students a measure they could use to see how effective their work had been.

The procedure works well because:

Students no longer were working alone at a tedious task, but had a buddy with whom they worked.

Students were more productive because of the work in pairs; they accomplished more shelf reading than they had working alone.

The error sheets offered the students a way of measuring the quality of the work they were doing.

Students concentrate on areas that need more shelf reading, so areas with the most patron use got more attention.

3. SHIFTING (D. Sloane):

- UCLA uses SRLF Selection Tool (SST). It is modeled from Yale and modified for UCLA.
- Identify areas that are impacted
- Selector is informed of impacted areas
- It run batches for selector based on criteria
- no more than 1000 titles in batch
- selector has choice to keep/discard
- can look at OPAC/bib record/MARC/holdings
- can add notes to records (there are “canned” notes)
- stats can be seen (e.g. x/xx are sent to SRLF)
- once batch is completed, it is closed.
- selector has one month to go through batch. If there are remaining material, everything gets discarded.
- Powerpoint (Shifting the Stacks) created by a student was shown.



"Shifting the Stacks2.pps"

- Also see useful information in the following website:
http://libweb.uoregon.edu/acs_svc/shift/index.html

B. STUDENT/STAFF MOTIVATING/TRAINING WORKSHOP – Greg Ferguson (UCSD), Gina McCollough (UCSD)



"Training - Best Practices.ppt"

1. TRAINING – BEST PRACTICES (G. McCollough): Based on answers from campus respondents, best practices recommendations are indicated below. See PowerPoint presentation, below are just additional information provided by G. McCollough during her presentation.

- PowerPoint: What level of staffing provides training?
 - Allows questions employees
 - Immediate supervisors or work leaders are considered to be the “experts”.

- PowerPoint: Do you have a standardized training list?
 - Most everyone have such lists.
 - Provides organized outline.

- PowerPoint: Do you have any written policies and procedures easily accessible to Circulation staff?
 - Most libraries have them.
 - Biggest challenge is keeping them updated.
 - Suggestion for Best Practices: (1) need to make time, maybe once a month, and discuss issues with staff, (2) post them for easy access

- PowerPoint: What is the average amt. of time spent training a new Circulation employee?
 - What was discovered is that there is no real set time.

- PowerPoint: What types of training methods do you utilize?
 - One caution: not allow other responsibilities rush training
 - Biggest challenge is keeping them updated.
 - Suggestion for Best Practices: using combination of various methods give best results

- PowerPoint: Do trainers follow-up with trainees, offer regular reviews...?
 - Follow-up is perhaps most difficult. For long-term performance, employees should know where to go.
 - Suggestion for Best Practices: (1) compliment good work, (2) continue encouragement

- PowerPoint: Does your Library provide any training assistance, such as library-wide trainer?
 - Don't give up.
 - Look at each other for assistance.

- PowerPoint: What techniques do your trainers use to motivate students to learn?
 - Humor is #1! - Breaks the ice
 - Stress their importance is #2! – Make them understand why they're there

- PowerPoint: Do you offer any special incentives or rewards?
 - At UCSD, supervisors bring food 2X/quarter. After 6 months of service, upgrade to graduate status for better benefits (for example, longer loan periods when checking out material)
 - At UCD, \$7.00 gift certificate at Student Union

- PowerPoint: Other words of wisdom...
 - If you have multiple trainers, be consistent.
 - Provide personal testimonies (for example, indicating that you were a student before)
 - The word “quiz” intimidates (students are always taking exams!)
 - Try to make training more interactive as much as possible, but don't go overboard
 - Talk to your students on what needs to be changed

2. TRAINING – (G. Ferguson): Showed PowerPoint presentation on the Millennium Circulation training module he created using Captivate.

- Software is made by Macromedia. It is called Captivate (formerly known as RoboDemo)
- MilCirc Training is shown to students before they actually work at Circulation.
- What the system does is to allow you to enter information. If incorrect, gives error messages. If correct, advances to next page.

TOPICS FOR NEXT YEAR

Security (L. MacLean, UCSC, Lars Cedarquist, UCD & Gail Nichols, UCD)

Handling Difficult Patrons (V. Novoa, UCSC & A. Panado, UCSF)

Handling Media (F. Bryan, UCD & C. Jimenez, UCSB)

In-depth discussion of Reserves (1/2 hour update) (UCB)

1.