

Library Publications Working Group Report and Recommendations

March 2004

The Library Publications Working Group was charged in July 2003 to review and refine three areas related to Library publications: design elements and conventions, creation and maintenance of publications, and infrastructure. (Appendix A: Charge) As a result of viewing many samples of current Library publications, the initial definition – which focused primarily on print publications called user guides, research guides, handouts, and leaflets – was expanded to identify specific categories. Library publications received from campus libraries and units included:

- ❖ catalog guides
- ❖ database guides
- ❖ finding aids and subject guides
- ❖ unit-specific introductions, maps, floor plans, and policies
- ❖ library-wide maps, services and policies
- ❖ one-time flyers, announcements, or annual publications, such as exhibits, prizes, summer reading list, top-ten lists, library course schedules, newsletters, development and fundraising publications, Library Guide booklet

Library publications can be generally separated into two broad categories: local publications and central publications. Local publications include those items that are: a) written primarily for one library or unit, b) intended for short-term use such as a class or specific event, and c) produced within an individual library or unit, often as photocopies. Central publications include those items that are a) written for use by multiple libraries, b) intended for longer-term availability, and c) distributed centrally by the Teaching Library.

A review of current library publications revealed a large number of informal, local publications that often paralleled content of central publications. Unfortunately changes of Library policies and resources were not always reflected in the local publications, resulting in misinformation for our students and faculty, and the design of the publications was so varied that it was often difficult to determine when it was last updated or who created it.

While local publications will continue to be needed for a number of purposes, the Working Group recommends that three specific types of publications be recognized as central publications: 1) Database Guides, 2) Library Catalog Guides, and 3) Library Services Guides. In each case, coordination and consistency would reduce development and production costs, utilize and extend the expertise of staff, ensure information is reviewed and updated on a regular basis, and create a more substantial infrastructure for incorporating guides into the Library web site. This report recommends policies and design of central publications, and support for the development of local publications.

I. Process

Currently the Teaching Library manages the communication and distribution of central publications for the Library available in Library Information Guides series. Library Information Guides are coded with the quantity printed, date printed, and author's initials, and identification number that includes one of two main classifications:

OL (Orientation Leaflet) – high-use guides which are printed by vendors

LG (Library Guide) – low-demand guides which are copied in house

Any library staff member may propose an idea for a new guide, or submit a draft of a new guide, to be included in the Library Information Guide series. The Library Guides Coordinator solicits authors, edits content as appropriate, and forwards to the Library Graphics Office for formatting and production. Original files are archived by Library Graphics and are available for revisions and reprinting. Printed copies are stored in the Teaching Library and may be requested by any library unit via the Library Guides Order Form (www.lib.berkeley.edu/Staff/OrderGuides.html). With a few exceptions, central publications are distributed to all libraries without recharge.

While the current practice works well, a few changes are recommended. Most significantly, creation, revision, and retirement of all Database Guides, Library Catalog Guides, and Library Services Guides should be handled via the Library Guides Coordinator. The Coordinator is in the ideal position to handle communication and process such as recalling outdated versions, vetting revisions with appropriate groups, ensuring availability of various formats, prioritizing requests for the Library Graphics Office, announcing updates and new publications, and maintaining lists of available guides for library staff and for the public. Centralizing this function into the responsibility of one person would create a more reliable infrastructure for the types of publications that are useful to many Library units. Also, the Working Group agreed that more standardized use of the UC Berkeley Editorial Style Guidelines would create greater consistency that would be beneficial for the Library. (http://identity.berkeley.edu/downloads/ucb_editorial_style.pdf)

It must be acknowledged that budget reductions may entice the Library to experiment with new approaches, such as reducing stock of print publications in favor of making PDF files available on the Library web site. As some publications are determined to be of lower use than anticipated, they may become available primarily as PDF files and print on demand. Since most of these publications are centrally funded through the Instructional Services budget, decisions related to printing costs will be made by the Head of Instructional Services and informed by broad input. The Library should not return to the recharge system for funding of central publications.

Recognizing that creation and maintenance of guides requires a great deal of staff time, the Working Group recommends that guides should be created with a view to efficiency and economy. Guides of any type should only be developed as needed, rather than encouraging a general proliferation of publications.

Recommendation 1. Creation, revision, and retirement of all Database Guides, Library Catalog Guides, and Library Services Guides will be handled via the Library Guides Coordinator. All library staff proposing a guide in one of these three groups should contact the Coordinator as a first step. The Coordinator will handle communication with appropriate groups – such as the guide author, Library Graphics staff, Library Web Manager, and Round Table – from development through distribution.

Recommendation 2. The Library Guides Coordinator will serve as an editor, ensuring that publications are reviewed for accuracy and meet the UC Berkeley editorial style guidelines before they are submitted for production.

Recommendation 3. For Database Guides, the individual with the most knowledge of a database should generate the content. To highlight important features, fields, and research strategies, development of guides for individual databases, rather than for vendors, are preferred. However, in some cases such as for "alert services" guides may be equally effective if designed for all databases by a vendor instead. Guide authors are encouraged to consult with electronic resource liaisons, subject specialists, and instruction staff before submitting the final draft to the Library Guides Coordinator.

Recommendation 4. For Library Services Guides, the Library Guides Coordinator will vet major revisions with appropriate groups, such as Public Services Council, to ensure that content suitably reflects library-wide policy and practice.

Recommendation 5. All guides will be made available on the Library web site as PDF files. The Library Graphics Office will ensure that these files are made available when a guide is created or revised. Guide authors may commit to maintaining an HTML version if they choose.

Recommendation 6. The Library Guides Coordinator will review the quantity of guides traditionally ordered to determine where reductions are appropriate. Continue to stock moderate print runs for guides determined to be in heavy demand; print less-used guides in small quantities on request.

Recommendation 7. The Library Guides Coordinator will review guides at least once every six months. Updates can be initiated by guide authors or the Library Guides Coordinator at any time.

Recommendation 8. The Library Guides Coordinator will articulate the procedures for creating, revising, and retiring central publications to assist library staff in understanding the process.

Recommendation 9. The Electronic Resources Librarian will draft a brief "Conditions of Use" statement to be included on all Database Guides. The statement should be vetted with appropriate library staff before being finalized.

II. Design

A great variety of styles, quality, and design elements are currently used for Library publications. The Working Group felt that consistency of some elements across publications, or at least among all publications of the same type, would be beneficial for library users and library staff. Introduction of the phrase "University of California Berkeley Library", commonality of images for guides within a series, and inclusion of other standard elements are recommended.

The use of colored paper and color printing for central publications was also investigated. While color content improves readability and is eye-catching, it is markedly more expensive and would not be of consequence to users printing PDF versions on black/white printers. A comparison of printing costs for 1000 copies is as follows: \$94.80 for black/white, \$736.25 for digital color, and \$958.00 for process color. For these reasons, color printing is generally not recommended for central publications, though can be used when special funding is available.

Recommendation 10. Print publications should not list URLs for multiple resources, but point users to the companion web page that can be more easily updated.

Recommendation 11. Guidelines for Database Guides:

- Use common icon in the upper left corner (Computer)
- Use the vendor logo in the header when appropriate
- Incorporate ‘University of California Berkeley Library’ in the header
- Include article database URL only if essential, and in a manner not to be confused with the Library web site URL
- Include standard “Conditions of Use” statement
- Include UC-eLinks information as appropriate
- Use standard footer
- Produce as 8.5 x 11 only

Recommendation 12. Guidelines for Library Catalog Guides:

- Use the Melvyl logo in the header when appropriate, or the common icon in the upper left corner (Computer)
- Incorporate ‘University of California Berkeley Library’ in the header
- Use standard footer
- Produce as 8.5 x 11 only
- Paper color changes when a substantive revision is printed

Recommendation 13. Guidelines for Library Services Guides:

- Use common icon in the upper left corner (Doe Library West Window)
- Incorporate ‘University of California Berkeley Library’ prominently in the header
- Omit ‘Library Services’ banner; let the title stand on its own
- Include URL to the web-version of the guide on the Library web site
- Use standard footer
- Produce as 8.5 x 11 only, not as bi-fold or tri-fold
- Paper color changes when a substantive revision is printed

III. Specific Guides

While reviewing the range of submitted guides, the Working Group identified some new database guides that would be helpful, as well as some older series that were considered no longer as useful to maintain.

Recommendation 14. Expand the Library Policy on Conduct guide to include “Conditions of Use” statement and prohibited computer use activities.

Recommendation 15. Discontinue the “Starting Your Research” web page which gathers a wide range of types of publications. Incorporate the Database Guides within the Article Database pages of the Library web site, the Library Catalog Guides within the Library Catalogs section of the new Library web site, and the Library Services Guides within the Library Services section of the new Library web site.

Recommendation 16. Create a list of guides related to the general research process (i.e.,

Citation Styles) into appropriate places on the new Library web site.

Recommendation 17. Retire the Remote Access to the Library Catalogs guide, and revise UCB Proxy Server Service to include pertinent remote access information.

Recommendation 18. Create new Library Information Guides for databases such as Reader's Guide Retrospective, Web of Knowledge, America History and Life/Historical Abstracts, EEBO/ESTC, MLA, PAIS and PsycInfo. If the vendor provides an online guide external from the database itself, the Library Guides Coordinator and database liaison may decide the appropriateness of using the vendor-supplied guide in place of one developed by our staff.

Recommendation 19. Create a guide for finding journals using Melvyl and GLADIS.

IV. Support for Local Publications

While the Working Group felt that some publications could be centralized, local publications are also important for a variety of reasons. They allow individual libraries and units to develop specialized instructional materials useful for specific audiences, events, short-term needs, or resources not widely available. There is strong support for the continued development of library guides for subjects and increased visibility of these and other web guides on the Library web site.

To facilitate the work of library staff who create local publications and ensure consistency where consistency is desired, staff should have access to appropriate tools. For example, while the CDL Adaptable Guides (<http://www.cdlib.org/inside/instruct/index.html>) were not considered to be of a quality and consistency high enough for Berkeley to rely upon, they were identified as tools useful for library staff to consult during development of new guides. Additionally, the idea of a Library publications toolkit was suggested as a way to outline and share standard conventions, logos, headers, footers, nomenclature, links to useful sources, and other adaptable content.

Recommendation 20. Guide authors should announce the existence of new local publications via the "instruct" reflector, and ensure their availability on relevant Library web pages.

Recommendation 21. Subject web pages should link to subject-specific guides along with web guides developed for specific courses in the department and general guides.

Recommendation 22. Develop and maintain a publication toolkit on the Library staff web site.

Recommendation 23. Provide learning opportunities for library staff to learn about software (i.e., Word, Adobe Acrobat, and Snagit) and approaches for creating high quality, local publications.

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