

Goals and Objectives

July 2003- June 2004

1. Goal: Identify and discuss policy issues and recommend best practices that facilitate resource sharing among campuses.

1a. Objective: Implement the Consortial Borrowing Software product. RSC and its sub-committee, RSC-IAG, have been an integral part of the process of implementing Fretwell-Downing's VDX, the consortial borrowing software. Once implementation is complete RSC will evaluate resource-sharing activities.

STATUS: Since October 1, 2003 UCLA and UCSB have been using VDX for borrowing, and SRLF for lending. UCB and NRLF are implementing the system for UC lending on November 17, 2003. The remaining campuses plan to implement this in fiscal year 2003/2004. RSC is preparing a report to SOPAG on issues surrounding the implementation from a campus perspective for November, 2003.

1b. Objective: Implement the Request feature in the new Melvyl catalog and CDL databases.

STATUS: The Request feature is basically completed except for maintenance and changes to individual databases. Among the many new MELVYL projects that RSC and RSC-IAG have participated in this past year are:

- testing UC-Elinks for databases,
- contributing to the design and testing of the “citation linker”, which is a blank request form that searches across the databases (many campuses will be able to use this to replace current public ILL web forms),
- and revising wording on request responses as needed to meet new or changed functionality.

1c. Objective: Evaluate pilot project to unblock REQUEST for Special Collections materials. This project has been a cooperative effort between HOSC and RSC. The pilot was conducted from June 2001 through June 2002.

STATUS: RSC has compiled a report with data provided by each of the campus liaisons, [Special Collections/Interlibrary Loan Pilot Project: Final Report and Recommendations](#), March 2003. This report was sent to SOPAG and is available on the RSC web page.

RSC has completed a follow-up report, Special Collections/interlibrary Loan Pilot Project: Report of Information Gathered During Joint Dialog Sessions,

October 2003. This report covers qualitative information gathered by RSC and HOSC, will be sent to SOPAG in November, 2003, and will also be posted on the RSC web page for broader review.

1d. Objective: Implement Desktop Delivery at all campuses.

STATUS: COMPLETED in November 2003. All campuses are providing web delivery of documents, following established guidelines, directly to UC patrons

1e. Objective: Review ILL Loan Periods.

Status: RSC asked RSC-IAG to review the length of loan periods between institutions for ILL with consideration to increasing the length of the loan. RSC-IAG has requested to reconsider the issue when the VDX software is fully implemented. Depending on the status of VDX implementation, a review may take place in spring/summer 2003.

STATUS: Now that the VDX implementation is moving forward, RSC-IAG will review institutional loan periods after all campuses have implemented VDX and feel comfortable with the new system, potentially summer of 2004.

2. Goal: Coordinate communication on UC resource sharing issues with interlibrary services, circulation, collection development, special collections, technical services, and other groups as appropriate.

Revise from email 2a. Objective: CAG Best Practices Workshop. The CAG is developing a proposal for a best practices workshop which will be reviewed by RSC and forwarded to SOPAG for approval.

STATUS: CAG is still considering proposals for SOPAG comments review on two workshops: Best Practices in Circulation and Best Practices in E-Reserves. Personnel changes have slowed discussions. RSC and RSC CAG will pursue this year.

2b Objective: RSC takes an active role in responding to reports from other All-Campus Groups. RSC will also actively investigate opportunities for collaboration, such as a joint eReserves program with HOPS.

STATUS: Recently RSC has responded to the following reports: CMPG Whitepapers, Shared Collections Whitepapers, Report of the Task Force on Government Information, and the SOPAG Web Page Template.

2c Objective: RSC maintains its web site using guidelines from SOPAG. RSC will advise RSC-IAG and RSC-CAG on meeting those guidelines on their web sites.

STATUS: The RSC website content and structure is under review during fall quarter, 2003.

3. Goal: Identify and analyze barriers to expeditious sharing of materials and recommend solutions to remove these barriers. This may include identifying new methods of resource sharing, consideration of local circulation policies that affect resource sharing and facilitating movement of materials among the campuses.

3a. Objective: Investigate methods of improving access to materials in storage facilities.

Status: RSC considered setting up a task force to review this issue, but SOPAG's current assignment, see 3G below, has overridden the broader issue.

3b. Objective: Review new technologies for providing digital images of microformat materials.

Status: A task force has been assigned to review existing and new technologies. A proposal is in process.

3c. Objective: Review Tricor contract with the feasibility and cost of increasing use of collections in libraries who are currently not part of the contract (i.e. Law libraries, UC managed Labs, etc.).

Status: Completed. A new contract with TRICOR has been negotiated for 2003-2004, which includes UC Davis Law Library, UC Merced and Stanford. In addition, weight agreements were renegotiated and will be reviewed on an annual basis so that campuses no longer need to pay minor overweight charges.

3d. Objective: Blocking UC Individuals at the Home Campus.

Status: A CAG sub-team developed a proposal to block, on the home campus, the library privileges of UC individuals who abuse their circulation borrowing privileges at other UC campuses. SOPAG reviewed the report and returned it to be re-worked as a guideline rather than a policy. RSC proposed developing a Resource Sharing Code to include this kind of information (see [Objective 3f](#)).

3e. Objective: Review External User policies

Status: CAG is reviewing policies granted to external users in an effort to standardize practices and create common understandings. The report has been delayed and is now expected winter 2002/2003.

3f. Objective: Develop a Resource Sharing Code. Because there continue to be resource sharing issues that need guidelines for staff, RSC will develop a

“Resource Sharing Code” for the UC’s.

Status: After VDX is implemented, RSC proposes to appoint a subteam, consisting of members of RSC, RSC-IAG and RSC-CAG, to work on an overall code for UC Resource Sharing. This code will include such items as guidelines to blocking patrons between campuses.

3g. Objective: Explore advanced delivery mechanisms in order to expedite the delivery of shared print collection materials from the RLFs without circulating them. (Assignment from SOPAG)

Status: A small subcommittee of members from RSC and RSC-IAG, Bob Freel, Scott Miller and Charlotte Rubens, will gather data for RSC and report in December about the range of alternative delivery mechanisms. RSC will report to SOPAG by February 14, 2004.

4. Goal: Coordinate collection, organization of and systemwide reporting of UC ILL/Resource Sharing statistics.

4a. Objective: Develop more efficient methods of reporting UC ILL statistics

Status: RSC will undertake this work in the coming year in consultation with Gary Lawrence and CDL staff to incorporate the statistical portion of VDX.