

Goals and Objectives

RESOURCE SHARING COMMITTEE

Annual Report for October 2005 - September 2006

During the last year, RSC completed the following activities:

- ILL code was modified in response to RSC's *Special Collections/Interlibrary Loan Pilot Project: Final Report and Recommendations*. SOPAG-written preamble to ILL Code also added.
- After much discussion and efforts to quantify the problem, RSC decided not to continue to press the issue of the loophole that allows Reserves items to be requested via ILL. We were unsure if the scope of the problem justified the programming required to fix it, and gathering the needed data was problematic.
- All campuses (except Berkeley) began using the Copyright Clearance Center Consortial discount as arranged by Pamela La Zarr, UCI.
- Approved specifications from CDL for changes to Request form.
- Approved modifications to Request form to allow requesting of missing items or items that are otherwise believed by Request to be locally owned.
- Tested interoperability of peer-to-peer transactions with Australian VDX institutions, and also Stanford and the CSU, who also have ISO compliant systems. Stanford peer-to-peer is being implemented; the others are waiting for policy decisions to address (primarily) billing issues, since VDX does not support anything similar to OCLC's IFM system.
- Advanced Fretwell-Downing workshops were held in the North and the South, March 2006.
- Responded to request for comments regarding implementation priorities for BSTF.
- March 2006 CAG and Circheads meeting in Santa Barbara, best practices workshops were held on the topics of difficult patrons, media, and security.
- Approved IAG recommendations for record retention in VDX.

Goals and Objectives

September 2006 – August 2007

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: *All campuses are currently using VDX for lending to other UC campuses. All campuses except UCB and UCR are using VDX for borrowing from both other UC campuses and through OCLC. The following campuses are lending to OCLC partners via VDX: UCD, UCLA, UCSB, UCSC, UCSD and UCM. A chart of current VDX implementation status is maintained on the Inside CDL website at <http://www.cdlib.org/inside/projects/request/vdx/currentVDXstatus.html>.*

Beyond finishing implementation at all campuses, the next significant milestone for VDX implementation will be the roll out of the "Z Portal," the patron interface to VDX. Users at campuses using VDX for borrowing will be able to view the status of their requests. Roll out is planned for late Summer 2006.

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

Status: Request form undergoing streamlining in Summer 2006, also adding functionality to request items that appear to be locally owned but may be missing. Review of Request is ongoing by RSC, RSC-IAG, and CDL staff, with input from HOPS.

1c. Objective: Establish the VDX Task Force to expedite final stages of implementing VDX and to provide a timely communication mechanism for staff and CDL.

Status: VDX Task Force, appointed in September 2004, continues to work diligently to implement VDX, offer support, troubleshoot, and recommend modifications. They meet through regular conference calls and maintain a website of information at <http://www.cdlib.org/inside/projects/request/vdx/>. Development of manuals and technical documentation for use by campus ILL staff are ongoing and are posted on the website. This group is recommended to continue until all campuses implement borrowing through VDX. A further request was made of SOPAG to expand membership on team in order to broaden campus input (more than one person per campus), in order to especially aid those campuses not yet implementing all features. SOPAG denied request.

1d. Objective: Review ILL Loan Periods.

Status: Although there has been no movement this year on this issue (campuses who were able to increase the length of their loan periods have already done so), we recommend keeping this objective until VDX is fully implemented at the remaining campuses.

1e. Objective: Establish a UC systemwide TRS Volume Purchase Program with the CCC.

Status: Implemented and done in 2006, with all campuses (except UCB) participating.

1e. Objective: Review UC Resource Sharing in light of the Bibliographic Services Task Force Report and any new initiatives the report leads to.

Status: Ongoing pending BSTF progress. We may also be able to use what we've learned from our experience with VDX implementation to inform subsequent UC wide projects, especially those that may include shared technologies, require new workflows, and necessitate changes in thinking, from front-line staff to upper management.

1f. Objective: Promote adoption of NCIP and related standards among UC ILS vendors to facilitate interoperability of circulation-related systems, such communications between ISO ILL systems and local circulation modules.

1g. Objective: Pursue expedited shipping of materials between the UCs and new peer-to-peer lenders.

Status: Investigating possibility of adding Stanford (and perhaps later the CSUs) to Tricor service.

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

2a. Objective: Continue the Circulation Advisory Group's best practices workshops at its annual Cirheads meeting. Topics are selected and assigned to campus representatives at one meeting for presentation the following year.

Status: Topics for the 2006 meeting were Security (UCSC, UCD), Handling difficult patrons (UCSC, UCSF), Handling media (UCD, UCSB), and Reserves (UCB). Past workshops have led to direct changes at libraries. The workshops will continue in 2007, and are slated to include discussions of billing and fines, and RFID, among other topics.

2b. Objective: Take an active role in responding to reports from other All-Campus Groups and investigate opportunities for collaboration.

2c. Objective: Maintain the RSC web sites using guidelines from SOPAG.

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: Continually review External User policies.

Status: Circulation policies of each campus are available on the CAG web page. CAG has reviewed these policies for accuracy in 2005/06. As a result of the Media Sharing Report, local campuses are investigating their local barriers to determine whether more items can be loaned. Nonetheless, some campuses continue to have policies and procedures that limit sharing of all types. These are 'living' policies and can be continually addressed.

3b. 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 UCs.

Status: Project has stopped and started several times. Will reassess and begin work in post-VDX environment.

3c. Objective: Pursue future Peer-to-Peer Lending with non-UC institutions using ISO-ILL protocol.

Status: Successful tests with Stanford and Australia, and rudimentary successful test with CSUs. Will implement Stanford (who is reciprocal with all UCs). Others implemented when fully tested and billing issues addressed. Current OCLC IFM system works pretty well; while 'Invoice Buddy' has been created to aid billing in VDX, it's still significantly more labor intensive. Will investigate possibility of agreements with CSUs to allow for bulk billing or pre-payment, so that bills not needed for each CSU transaction.

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: The VDX Task Force continues to work on improving the statistics derived from VDX; when useful and transferable statistics are ready, RSC will consult with Gary Lawrence.

See also the annual reports