

SOPAG/RSC-Interlibrary Loan Advisory Group (formerly HOPS- ILL) Minutes

October 21, 1999

In Person Meeting, Oakland, UCOP Building

ATTENDING: Charlotte Rubens (UCB, Chair, RSC Liaison), Gail Nichols (UCD), Judy Bube (UCI), Pam LaZarr (UCI), Donna Gulnac (Recorder-UCLA), Janet Moores (UCR), Ann Harlow (UCR), Gary Johnson (UCSB), Julia Graham (UCSC), Tammy Dearie (UCSD), Edith Amrine (UCSF), Naheed Zaheer (Stanford), Jutta Weimhoff (NRLF), Bob Freel (SRLF)

1) Announcements

Charlotte announced that Laine Farley will no longer be regularly attending RSC-IAG meetings. She will attend on request if we have a specific agenda item, which requires the expertise of a CDL staff person.

Tammy Added two agenda items to section 6: "Reasons for no" and Web of Science and FirstSearch Request options.

2) Approval of Minutes for 7/22/99 meeting

The minutes for this meeting were approved (with some name corrections).

3) Dates for 1999/2000 Calls/Meetings

The following dates were tentatively set for next year's meetings:

January 27; April 20; July 20; October 19 (in person meeting).

4) New Charge (and name) for the Committee

The charge we developed at the in person meeting last year was adopted, with some minor changes, by the new Resource Sharing Committee, so we need to come up with a new charge. We agreed that the new name for the committee is the SOPAG/RSC-Interlibrary Loan Advisory Group.

Charlotte is writing up the new charge, but here are a few notes from the discussion. We felt that this group should focus more on procedural issues.

Membership: There was some concern expressed about having the appointees selected by the UL. Tammy said the new Circulation Group was concerned that the UL would appoint members who are in charge of large units and may not be familiar with the day-to-day operations. The group decided to include the wording: "... Appointed by the UL from the appropriate ILL operational unit." We discussed whether we needed a CDL rep. The group decided to try not having one and calling on Laine for PIR issues. Tammy pointed out that for non-PIR issues we would need to a different CDL representative. The group would like to keep the Stanford Representative. Charlotte will continue to be the liaison to RSC for now, but she may not continue to be on RSC.

Duration of Terms: Only for chair--two year term. We will select chair alternating between Northern and Southern campuses.

Additional Meeting: Tammy suggested we have one in-person meeting a year of all ILL operational staff. The group agreed this was a good idea and will have this meeting in the Spring. Hosting of the meeting will alternate between Northern & Southern campuses. This makes a total of 5 meetings per year.

New Chair: Judy Bube has volunteered to be the new chair of the committee. Her term will begin in January (thanks Judy!).

5) Action Items from RSC

- a) CCC Participation--RSC would like us to investigate how much we're paying in copyright fees. This is being looked at as a possibility for spending some of the additional allocation from the UC budget for Resource Sharing funds. Please send your CCC figures for the last two years (if available) to Charlotte by November 15. Some members felt this is more of a campus responsibility and that it is unlikely that the funding will go towards this. Load leveling reimbursements for net lenders (see 5d below) and new technologies like Avanti for electronic delivery of documents will probably be more attractive to RSC for spending this money.
- b) *TRICOR* (note: Agenda item 6b was also discussed here)—As a general note—every campus reports having billing problems with TRICOR. When asked about billing credits from last year, Tammy said Bruce Roberts told her “they are coming.” We had a general discussion about delivery problems with TRICOR. Tammy pointed out that some of the local carriers are not “owned” by TRICOR, but their services have been contracted out by TRICOR (and they are in the process of buying out many smaller companies). UCSD and UCD are both having meetings with Bruce in the near future. Charlotte suggested having the local operations manager attend these meetings as well. We then discussed pick-up and delivery times—most campuses are having trouble with these times (the courier is sometimes hours late for some campuses)
- c) *Status of MOU with TRICOR:* Tammy is working this out. If the current weight allowance for a given campus is not enough, let Tammy know and she can see about increasing it. Also, she needs to know the desired pick-up and delivery times for each campus so she can write this into the contract. She will then see if she can add something about consequences for missed delivery/pick-up times. In addition, we need to add clauses for dealing with Special Collections items. The current insurance coverage for materials is \$100, which needs to be raised for these items. There is currently no claim form for damages. Gail volunteered to add a TRICOR damage claim form to the UC-ILL Web page. The form will be in PDF format. We decided the form could also be used to report performance problems, such as delivery/pick-up time problems, deliveries to the wrong place, etc. Gail will collect these forms and keep a centralized report of all damage claims on the web, so we can document these problems (also, RSC is interested in this information). The form should include: campus to and from; damage; type of packaging (if known); estimated value (repair or replacement); time problems; delivery to wrong place, etc. Bob suggested that we come up with some expectations for TRICOR and noted that some of the responsibility is on the sending library (he cited an example of an LP that was sent in a TRICOR pouch). Tammy says that UCSD has been putting streamers in damaged books indicating that they are being sent damaged, so that the receiver knows the damage is not TRICOR's fault.
- d) PAG Packaging and Shipping Guidelines—We were charged to look over these guidelines and then come up with our own. Gail says we need to come up with these ASAP because the Collection Development Heads will be discussing this soon. Judy volunteered to draft these guidelines, by format, e.g. articles, books, LPs, microform, videos. Julia asked whether there were perhaps better pouches—maybe with padding. Bruce Roberts apparently tried pouches with Leather bottoms and said they were no better. Tammy says that you can get inflatable wrapping. She also suggested using jiffy bags as padding since they are reusable. Most campuses feel materials are damaged less,

or no more, than when they were shipped through UPS and feel that the number of damaged items is probably very low compared to the numbers shipped.

For the guidelines, we recommend no change for the handling of books and articles. Special collections materials should have special treatment. We may want to recommend that Special Collections staff package Special Collections materials. Probably 90% of the material shipped is non-problematic, but we should tag fragile or damaged material before shipment. Tammy will help Judy with these guidelines, but they should include: no throwing; covered vehicles; materials covered in rain.

- e) Unit costs—These need to be determined so that net lenders (UCLA, UCB, and UCD) can be reimbursed for lending of both returnables and non-returnables. \$740,000 of the augmentation to CDL's budget was designated for resource sharing (note: TRICOR costs around \$100,000 per year). UCD came up with a unit cost of \$14.88 per item.

6) Updates/Discussion

- a) PIR Update: Articles are coming in mid-January 2000. On November 3, the test database will be available for testing by ILL units. Campuses will be asked to create dummy patron records for testing. Look at the interface and comment on that as well—some redesigns have already been done. It will be available in all CDL-hosted databases, except for NEWS (?). Some of the new policies include:
 - i. New limits (20 articles and 20 books per 24 hour period)
 - ii. Will block Special Collection items or materials owned electronically
 - iii. Users will be able to request items checked out on home campus (Gail mentioned that ILL units need to be extra responsive to recalls of ILL materials).
 - iv. Reserve materials will be blocked.

Mary Heath is working on an algorithm so that in each patron record, you can say, "send it to my custom holdings." You can have different custom holdings for articles and books (it can handle each differently). You will also be able to set up custom holdings to go outside UC.

Mary and Tammy are going on campus visits to provide updates on PIR and also talk about the final version of the "Needs Assessment Survey."

Phase 3 or PIR is scheduled possibly for 2001. This will include requesting in non-CDL-hosted databases like WorldCat and Eureka and will be extended to undergraduates. The Patron databases will need to be able to do real time checking before undergraduates can be added.

- b) See 5b above.
- c) Charlotte says UCB will probably end up being listed once for PIR, but they may not always be able to make the 4-day turnaround time. CDL wants us all to be listed once because it helps the load-leveling algorithm. If listed once, it's easier for the program to count symbols and do the load-leveling properly.
- d) Reflector, Manual, Roster—The e-mail reflector name will be changed from HOPS-ILL to RSC-IAG. The web ILL roster was passed around for updating. Send any additional changes to the roster and manual to Gail.
- e) Electronic Journals—Julia asked what each campus was doing if a request was received for an electronic journal. If the item is for something that all UC users have access to,

most lending campuses will either download it once, but let the borrowing campus know it's available or just let the campus know it's available online. If it's something subscribed to locally by a campus, most campuses will download for a UC user if allowed by the licensing agreement. Tammy says that UCSD has all of their licenses scanned and loaded on the web. She said she asked CDL if they could do this for their licenses, but they said licenses change and it would be too much work to keep the page up.

- f) Reasons for no on OCLC. This can now be recorded on the new version of the Microenhancer. Tammy would like for all campuses to download the new version (if not already done) and start using this feature.
- g) Web of Science and First Search Request options: For Web of Science, users can mark requests for adding to a list, which can then be sent as an e-mail to a designated ILL unit. FirstSearch now has a request feature in the Web version. Each campus can ask for this feature to be turned on and the requests will be sent to the OCLC review file for that campus. Anyone can use these (there is no verification of patrons), but campuses can put in text about what the rules and regulations for use are. Tammy is testing now testing both of these at UCSD.