

MINUTES FROM JULY 2000 CONFERENCE CALL

Resource Sharing Committee, Interlibrary Loan Advisory Group
Minutes of Conference Call
July 20, 2000, 1:00pm-3:00pm

Attending: Charlotte Rubens, UCB, Gail Nichols, UCD, Pam LaZarr and Linda , UCI, Donna Gulnac, UCLA, Janet Moores, UCR, Gary Johnson (chair), UCSB, Deborah Turner, UCSC, Tammy Dearie (recorder), UCSD, Edith Amrine and Jackie Wilson, UCSF, Bob Freel, SRLF, Rob Daigle, Stanford

Announcements: Edith Amrine announced that she was leaving SF due to a relocation of her family to the Irvine area in the next few months.

1. Approval of minutes (4/20/2000 call)
Minutes were approved as finalized.
2. Results of ON-LINE PIR/REQUEST patron survey and Staff Survey (see URL's below):

PIR Online Patron Survey results:

<<http://www.cdlib.org/libstaff/sharedcoll/projects/pir/>>

PIR ILL Staff Survey results:

<http://www.cdlib.org/libstaff/sharedcoll/projects/pir/survey/staff/request_staff>

Dearie provided a summary of the surveys that were distributed online, one to patrons the other to staff.

The Patron Online Interface Survey was designed to assess satisfaction with the interface. The survey was distributed May 1-May 14, 2000. There were 64 responses with 3 duplicates. Most respondents either agreed (54%) or strongly agreed (33%) that the instructions for using Request were easy to understand. Most respondents were graduate students (over 60%) followed by faculty (20%) and the remainder were staff and library staff.

Comments on what CDL should do to change the process included:

- ◆ confusion by one user of the difference between request and ILL
- ◆ the need for shorter account numbers (or better instruction by library staff in how to set up a profile)
- ◆ a request to increase the limit of 20
- ◆ better notification of unavailable items
- ◆ better linkages between monographic materials in Psychinfo and Medline
- ◆ better notification when items have arrived
- ◆ more PR for request

The ILL Staff Satisfaction and Behavior Survey consisted of a 14 question online survey. The survey was made available to ILL staff for anonymous response from mid-June through July 2000. Attendees of the ILL best practices workshops were encouraged to respond, as were all ILL staff via the Resource Sharing Committee (RSC) and the RSC's interlibrary loan advisory group.

The survey provides moderately strong evidence that Request has positively affected workflow and operations by streamlining or increasing productivity, although many areas for improvement were

identified. The majority of respondents were sure that loan activity had increased due to Request, but more than half thought it too soon to tell or were unsure whether overall ILL activity had increased on their campus. ILL staff, and the few public service staff who also took the survey, believe that Request is a real service to users and want to see it extended to undergraduates, to other CDL-hosted databases, and to allow patron tracking of requests.

Some future enhancements noted by library staff included the following:

- ◆ ability to request from other databases (OCLC, RLIN, etc.)
- ◆ direct link to Docline for Medline articles
- ◆ include borrower status in lending request
- ◆ include ability to request non-circulating items
- ◆ establish ability for undergraduates to use request
- ◆ add "fill-in-the-blank" request option for items not in UC automated ILL system
- ◆ remove limitations on number of requests

RCS-IAG members were encouraged to review the responses for possible issues at their campus.

3. CDL Update, PIR Phase II-III

Dearie reported that the PIR Team is working on the steps necessary to introduce Request to the undergraduate process. A couple of issues are still outstanding. Dearie listed them with the current status:

*Proposal to limit UG request to 5 books/5 articles

-Under review by SOPAG

-Update: SOPAG endorsed the limit with the caveat that we review usage at the end of the first quarter

*Need to include a "last usable date" option for all users

-Under review by RSC, RSC-IAG, PIR Ops

*Need for campuses to review messages for possible editing

-Under review by PIR Ops

*Need to include patron status in the request

-Michael Thwaites will add patron status to patron name field before Request is released to undergraduate students

*Real-time patron authentication

-Mary Heath is developing the API application that will allow for real-time patron authentication.

The plan is to have it available to the campuses at the beginning of Fall before we open Request to undergraduate students.

*Standardized loan periods

-Karen Butter took the issue to SOPAG for review. There was no consensus on a standardized loan period, but considerable support for a standardized 4-week loan for undergraduate students.

Campuses will be asked to respond back to SOPAG by August 11 with their willingness (or not) to support a 4-week loan period.

4. Consortial borrowing software / RFP status

Dearie gave an update on the current status the Consortial Borrowing Software (CBS) system. The PIR Team had made the decision at the last meeting that a centralized CBS system would be in the best interest of the UC libraries. It would provide all libraries with the ability to implement ILL management software and allow CDL to focus on developing links to one system instead of 9 different systems. Karen Butter was taking the request to SOPAG for discussion and approval. Update: SOPAG approved the decision to move forward with a centralized system for the CBS. The RFP will be written and submitted for posting. The timeline is to have a system in place and operational Spring 2001

5. Statistics / Counting PIR

SOPAG asked RSC to revisit the issue of counting PIR transactions. There is concern that PIR transactions may not be included in regular ILL transactions. All campuses reported that they included PIR transactions as ILL transactions and are reporting them appropriately.

6. Post ILL Workshop discussion

Dearie asked for a campus round robin report on impressions of the ILL Workshop - were the goals met, were staff supportive of the ideas, where changes being made? All campuses reported that the workshops were well received with several campuses already making changes in their operations.

Berkeley: Borrowing has already tossed some paper files, made changes. Lending is looking at the issue of 2nd searches.

Davis: Reporting from Shields: Plans to go completely paperless in the fall. Staff had several "growth insights" from the workshop. There was some sense that the workshop was too long. Not sure what the reaction was by the Health Sciences library staff. The Medical Library staff person did not return for the second day.

San Francisco: Positive experience at the workshop. Did not find Mary condescending. They are already paperless and performing at 90% of high performing characteristics. They found the workshop to confirm what they are doing already.

Santa Cruz: Staff who attended the southern workshop were very encouraged and enthusiastic. They are making changes in staffing levels and operations.

Los Angeles: Positive experience, already making many plans for changes. Ready for CBS software now. The workshop provided extra motivation for making changes.

Irvine: Very enthusiastic response. Many liked paperless approach. They got several good ideas for reciprocal partners. The library will be sponsoring a series of meetings to take apart their current procedures for possible change.

Riverside: Got a lot out of the workshop. Considering moving all patrons to electronic requesting. They felt challenged and are conducting follow-up meetings on campus.

Santa Barbara: Motivated, but a bit frustrated since they are eager to move ahead with CBS type software NOW. The staff had a ceremony in which they barbecued their lending file. They increased their max cost to \$50. Plan to get rid of the borrowing file this fall. Working on making CLIO more a part of the operations until a CBS system is implemented.

San Diego: Very enthusiastic. One staff person couldn't sleep the next night because of the ideas for change. A follow up meeting will be held to deconstruct ideas and move forward with changes.

7. Dearie asked what message RSC-IAG wanted to convey to the UL's (and AUL's, ILL Managers, etc.) at the follow up meeting to be held August 21, 2000.

*Need for more AUL level participation and support. The northern workshop had no one attending at the AUL level. The south had two AUL level participants. Not participating was seen as lack of support.

*Need for space a critical issue at many campuses. PIR is not going to decrease activity and will require more support in terms of space, staffing, technical support, and resources.

*Need support for making policy level changes that may not be popular with primary clientele. Administration needs to show support and back staff decisions.

8. Desktop Delivery Project

Nichols and Dearie reported on the status of the desktop delivery proposal that was reviewed by SOPAG and assigned to the PIR Team for implementation. Claire Bellanti from UCLA has become a part of the PIR Team and will be focusing on creating a charge, selecting members, developing a budget, and moving the project to implementation. SOPAG is very supportive of desktop delivery and would like it implemented as soon as possible. The PIR Team is looking at ways of incorporating the service with the CBS system.

9. Confidentiality and ILL records

Managing the history of transactions associated with patron information continues to be a topic of concern for Interlibrary Loan units. At the present time, however, no further discussion is warranted but individual campuses may wish to evaluate how applying a circulation model of stripping away patron information from a transaction may fit into their Interlibrary Loan procedures.

10. Buying rather than borrowing inexpensive materials (See example below.)

Johnson asked the following question: At this cost, does it makes sense to attempt to borrow or buy?

Banking Online For Dummies® by Dummies Technology Press Staff (Editor), Meadhra, Paul A. Murphy. Amazon.com's Price: \$19.99 Paperback - 384 pages Bk&Cd Rom edition (February 18, 1999) IDG Books Worldwide; ISBN: 0764504584

Several members said that they were researching this issue and trying to determine a way to streamline the processing of such purchases. San Diego is getting a credit card to pay for transactions. Several campuses reported that they purchase direct from the campus bookstore and lend after a quick catalog record is created. Several campuses wished they had the option of paying outright, but library policy dictates that they charge the patron for the loan or purchase.

11. The next meeting will be October 19th, from 10:00 a.m. to 3:00 p.m. at UCOP, Franklin Building in room 10325.