

MINUTES FROM OCTOBER 19, 2000 MEETING IN OAKLAND
RESOURCES SHARING COMMITTEE, INTERLIBRARY LOAN
ADVISORY GROUP

Minutes of Meeting
October 19, 2000
10:00 a.m. to 3:00 p.m.

Attending:

Charlotte Rubens (UCB), Gail Nichols (UCD), Pam La Zarr (UCI), Linda Michelle Weinberger (UCI), Donna Gulnac (UCLA), Janet Moores (UCR), Gary Johnson (UCSB), Jennifer Walker (UCSC), Tammy Dearie (UCSD), Edith Amrine (UCSF) (recorder), Jacqueline Wilson (UCSF), Colleen Carlson (SRLF), Rob Daigle (Stanford).

Announcements:

This was Donna Gulnac's last IAG Meeting. Bob Freel will be UCLA's representative to IAG and Bob has moved from SRLF to UCLA's Louise Darling Biomedical Library.

1. Approval of July 20, 2000 minutes

Minutes were approved as finalized.

2. Introduction (everyone)

Since there were a few new members, everyone introduced themselves. New members are: Jennifer Walker, UCSC; Rob Daigle, Stanford.

3. Housekeeping (Gary, Gail). Review our charge, roster, campus updates, meeting schedule, all campus meeting.

Reviewed membership, meetings and charge. Discussed change in the fifth meeting of IAG. Possible change in the wording: "The fifth meeting may take on a variety of topics/issues..." Discussion of possible meeting topics: Copyright. Spring meeting possible (late June), need approval from SOPAG and an invitation to go out to the New UC Copyright Committee.

The 2001 schedule for IAG is:

Conference calls: Jan. 25, April 19, July 19; 1 p.m. to 3 p.m.

In Person: October 18, 10 a.m. to 3 p.m.

The minutes will continue to be taken in an alphabetical campus sequence: UCB, UCD, UCI, UCLA, UCR, UCSB, UCSC, UCSD, UCSF, NRLF, SRLF, Stanford.

There was a discussion about Campus Updates. These updates will continue to be an attachment to the formal minutes. These updates will be sent to the list if time is short and there is no time to report. If campus updates are not reported and any campus has information to share with the list, identify as "campus update".

Gail Nicholas will place the IAG Meeting Minutes on the web, beginning with the January 2000 meeting. Members thanked Gail for making these minutes available on the web.

4. Desktop Delivery (Charlotte)

Charlotte passed out a draft of the “Functional Specifications for Desk Top Delivery System”. There are 6 companies (so far) that are participating, according to Claire Bellanti, chair of the Desk Top Delivery Committee from RSC. The RSC is proposing that this web delivery be functional in 6 months, implemented possibly by July 2001. Any additional information/specifications and/or comments are needed to Charlotte by Monday, October 23, 2000. Charlotte did report that the hardware specifications were not included in this report—these were still being discussed.

5. TRICOR Discussion (Tammy, Gary, Gail)

Service concerns – Tammy will talk to Bruce Roberts about these concerns/problems:

Santa Barbara: Pick up time should be earlier. Bins are inadequate and fail to be useful.

Santa Cruz: Book from San Francisco to Santa Cruz arrived wet. Do not like TRICOR. Pickup/delivery around 11:00 a.m. is too late.

Berkeley: Delivery time is too late – 10:00 to 11:00 a.m.

San Diego: Non-responsiveness from Bruce Roberts and delivery time.

Irvine: No complaints. No problems with delivery time or delivery persons. New bins would be great.

Riverside: No complaints. TRICOR now delivers/picks up from the Science Library.

Los Angeles: Haven't heard of any complaints/problems.

SRLF: No problems or complaints. No damaged materials reported.

Davis: Has a new, separate service with TRICOR for afternoon pickup/delivery from Carlson Health Sciences Library to Medical Center Library.

Stanford: Morning arrival time getting closer to 11:00 a.m. which is not good. Do not go to Bruce with problems – talks with Veda in the South San Francisco office. There has been more traffic with Hopkins Marine and Stanford. On the whole, TRICOR has worked well.

San Francisco: Invoice problems still not resolved. Still being billed for items that should not come to San Francisco.

Action Items:

- Need to have final signed MOU from Bruce Roberts. Current contract to expire January 2001.
- Tammy will forward TRICOR schedule to IAG.
- All items being sent to Santa Cruz should be wrapped in plastic.
- During the rainy season, wrap all items in plastic.
- Look at alternative containers – Gary, Tammy, Scott
- Be more diligent in filling out the TRICOR web forms (Gail reported that according to the TRICOR fax reports, there have been very few problems).
- Go back to staff and report that TRICOR, UC system wide, has very few problems.

6. HOSC ILL Needs Statement – Gary

Some discussion about Special Collections materials not being made available through alternative methods of delivery: digitizing, copying, etc. Stanford received a grant funded by the State to provide a digital copy of material out of the copyright years, 1905 or older and government documents. Stanford informs the user that material will be scanned, placed in a PDF, and use a web address. Special Collection material that has been digitized, the URL will be added to the catalog. Stanford has digitized whole books. Gary asked Rob to write down all the steps involved in this digitizing process.

IAG Recommends:

- There should be a pilot project to begin Winter Quarter through June 30, 2001 to modify CDL REQUEST to make available Special Collections materials. Special Collections then will determine if material can be loaned or copied.
- Urge Special Collections Departments to investigate the digitization of their materials.
- Use the existing ILL processes and procedures. There should be only one ILL person to be the liaison for Special Collections worked out on each campus. There should be continued communication between ILL and Special Collections.
- A list of shipping instructions to be determined.

Gary and Pam will work on this DRAFT proposal to HOSC.

7. Checklist for Directors. Changes made or planned by each campus (all).

Santa Barbara: Burned Lending files. Looked at other areas: borrowing only ½ paperless. Looking forward to getting rid of all paper. Making better use of ARIEL. Purchased a new scanner. Use Dissertation Express. Barcode all books.

San Diego: 7 ILL units at San Diego. Went through all the items on the checklists. Came up with 4 or 5 items to change from decentralized Lending to Centralized ILL Lending. Each ILL Unit has a credit card. Use credit card to purchase items for patrons use, send out to the patron first, then review for adding to the collection.

Berkeley: Nothing new. Borrowing dumped a huge file, now down to one little file for current requests.

San Francisco: Waiting for CBS to make Lending paperless and to make major changes in Lending. Hope CBS works with DOCLINE requests. Looking forward to Desk Top Delivery to reduce flow of paper from campus to campus.

Irvine: Subsidizes the requests and this makes the process more efficient. Download twice a day for Lending requests. Working on interchange of ILL Units.

Riverside: Lending tossed files – use CLIO. Still receive paper borrowing requests but enter request then toss paper. Not checking a second time for items. Hire student assistants that want to work.

Los Angeles: Do not count pages. Have streamlined charges—use IFM. Some ILL units have discarded paper files. Law Library has new purchasing guidelines and will get a credit card.

SRLF: Lending has no paper files. Still accept requests that are not electronic. Changes: redirect users to ORION 2 OPAC Plus. Have begun a cost study: flat charges for shipping (Non-UC), no extra charges for extra pages. Testing RELAIS. Need more automated invoicing and mail services.

Santa Cruz: Have changed everything. Have streamlined requests. Made a web form. No limits. Everything can be delivered anywhere on campus.

Davis: HSL: do not phone patron but email when request comes in. Use CLIO to have patron check status of outstanding requests. Use patron authentication. In January NRLF requests will change to ILL from Circulation. Law Library still not cooperative. Do not use credit cards yet.

Stanford: Found checklist very interesting. Green Library: no, yes, not yet, yes But. Referral model: Info Desk refers Ref questions to Bibliographer, Curator. Interlibrary Borrowing will find document or book expert would order the item. ILB forms online. Requests would go directly to a specific library and then be filled by that library. Looked at different ways to fill requests. Did get a credit card. Using RLG's ILL Manager. Lending: Digital ILL. Change lending to get rid of paper requests. Promoting accepting email requests, rather than fill out forms. Delivery options: URL, attachments, palm pilot.

For All UC Libraries: one way to speed up the requests – do not look twice for an item unless the library is the last one or the only one of the Lending string.

8. CRL (Center for Research Libraries). Do people use it, for what and how much? (UC's yearly membership in CRL is \$275,000)

Santa Barbara: 1997, 468 requests (60% loans, 17% copies). Disciplines using CRL: 22% History; 14% Art History; Science did not use it.

San Diego: 127 requests (9 months worth); Medicine, Magnetic Recording

Berkeley: 1999/00, 257 requests

San Francisco: 1999/00, 15 requests

Irvine: Between 1980 and 2000, 150-250 items/year. Great service.

Riverside: 1999/00, 56 requests (400 items – 87 volumes for one title). History and other Departments use it.

Los Angeles: no data – needs to check on this and will get back to us.

Santa Cruz: 1999/00, 26 loans, 13 copies

Davis: 100 requests/year. 2/3 loans, 1/3 copies

Stanford: Not a member. Under 30 requests per year. Pays \$110 per loan, \$75 per photocopy.

Advantages: Long loan periods; will send lots of material at one time.

9. Consortial Borrowing System (CBS) Update – Tammy

Tammy gave an update report on CBS. CBS will route requests internally with all UC Libraries, NRLF and SRLF. Tammy reported that the PIR Team was working on the evaluation forms and that an evaluation team will be formed with members appointed by the UL's.

The timeline for the RFP process:

October 15, 2000	Release of RFP
November 15, 2000	Submission Deadline
Mid-December 2000	Finalist chosen
January 15, 2001	Successful Vendor presentation
March 1, 2001	Contract
April 1, 2001	Implementation

The list of vendors includes: CLIO, CPS Systems, EPICTEX, FRETWELL-DOWNY, Innovative Interfaces, Inc., Library Corp., OCLC ILLiad, Wings, RELAIS, Research Library Group ILL Manager.

10. PIR Team Update – Tammy

CDC sent back to RSC to choose what other databases to add to CDL. Tammy passed out use statistics on the other databases that might be considered. Sherry is working on a new document. Tammy also passed out Lending and Borrowing statistics from PIR and CDL. Tammy stated that the next steps are to look at the PIR undergraduate limit and evaluate its impact, if any, and also to look at "Need by Date" and discuss if problems have occurred.

Meeting adjourned at 3:00 p.m.

Next meeting of IAG is a teleconference on January 25, 2001 from 1 p.m to 3 p.m.