

RSC-IAG Conference Call
January 25, 2001

Minutes of the Meeting

Present: Jennifer Walker (UCSC), Gail Nichols (UCD), Tammy Dearie (UCSD), Janet Moore (UCR), Bob Freel (UCLA), Gary Johnson (Chair, UCSB), Colleen Carlton (Recorder, SRLF), Rob Daigle (Stanford), Charlotte Rubens (UCB), Edith Amrine (UCSF), Pam Lazarr (UCI), Linda Weinberger (UCI)

Additional Agenda Items: SLASIAC Proposal
Mellon Approval for CMI Project
German Resource Project

1. Minutes for the October 19, 2000 meeting were approved as written.
2. Consortial Borrowing Software (CBS) Update (Dearie)
We are now in the post-RFP period: three bids have been received and evaluated. Questions for the vendors (based on their bids) have been responded to and reference checks will follow shortly. Completing the references will take 2-3 weeks. Assuming the committee picks one of these vendors, expect one month for the vendor to set up policy tables. The implementation plan is still being discussed. One option is to phase in 2 or 3 campuses at a time, or bring all campuses up at once. During the implementation period it will be necessary to run parallel systems (old and new systems).

All three vendors have desktop delivery components in their systems. The DDS Task Force now recommends that a DDS vendor not be selected until the CBS vendor is chosen.

3. REQUEST Issues (Dearie)
Blank Request Form: should CDL mount one, or wait for arrival of a CBS that provides one? Consensus among IAG is that we can wait for CBS version. Each campus has a blank request form that should serve user needs until the new CBS arrives (January 2002).

A&I Databases and REQUEST: should CDL provide Request, or can we hold off on this until after the RFP process for the new Melvyl system? IAG agrees that we can wait to implement Request in A&I databases.

- 3.5 SLASIAC Resolution D (Dearie)
SLASIAC has put forward a resolution that world-wide-web based "Request" is the preferred method for user initiated intercampus loan requesting. The committee recommends that campuses make every effort to complete the transition to WWW based Request by the end of the 2000-01 academic year.

Comments from IAG: has this resolution gone to the faculty? Some faculty, on some campuses, are still fond of telnet and paper forms for their ILL requests. It is this user group that will be most concerned about the SLASIAC resolution.

4. Undergraduate REQUEST limits.
IAG has been asked by SOPAG for comment on the undergrad Request limits (currently 5 loans and 5 articles daily), and a recommendation on whether or not these limits can be changed. Based on REQUEST statistics for the fall quarter, undergrad requests account for 9% of the total. Consensus among IAG members is that the limits can be raised to match the "20 and 20" daily limit for faculty and grad students.

Some concerns were expressed, most notably that ILL units are stressed during peak periods. However, the limits are not generally a factor in those peaks, nor are many users attempting to exceed the limits.

IAG's response to SOPAG will be put forward immediately with the following recommendation: that undergraduate REQUEST limits be raised to 20 and 20, and that this change be programmed by the end of March 2001.

5. Counting RLF Statistics

SOPAG has also asked for IAG comment on the draft document "Guidelines for Recording ILL Lending Transactions for the Regional Library Facilities". Effective this year, the RLFs will report lending statistics to UC Systemwide Library Planning on Schedule C (report of interlibrary transactions).

Questions raised by IAG:

1. Should campuses count their referrals to the RLFs? Berkeley counts the referrals as requests, but others count them as not filled (reason: other). How to resolve this discrepancy? Tammy reminded the group that HOPS/ILL, back in 1998, had recommended that campuses count what we lend, which means that referrals will be counted as "not filled/other".

2. Are we counting items or requests? Apparently practice differs from campus to campus, depending on the software that is being used in the ILL units. The RLFs count items loaned, using data captured by the circulation system. Colleen explained that as the RLFs were working on the draft document, the understanding was that statistics would only be gathered by using existing automated methods. Counts for items lent is always available for the RLF's from the circulation system, but requests are not all received via automated/electronic methods. Among the campus ILL units, there is discrepancy on counting items vs. requests. Those who use circulation systems for ILL items may receive item statistics, but those who use OCLC Management Statistics and/or CLIO receive request transaction statistics. However, the numbers are probably not dramatically different since most requests are for single items.

IAG recommendation to SOPAG: IAG has no problem with the "Guidelines for Recording ILL Lending Transactions for the Regional Library Facilities". We suggest that SOPAG revise the Schedule C form to accommodate item transaction counts as well as request transaction counts. Gary will forward this recommendation to SOPAG via V. Jorgensen immediately.

6. Proposed Pilot Project for Special Collections Request (Dearie)

Tammy reported on the December HOSC meeting at which the proposal to allow REQUEST for special collections holdings was discussed. There was agreement among the Special Collections units to allow the project to move forward. The project is seen as an opportunity to monitor the demand for special collection materials. Upon HOSC recommendation, the project will be set up for one year. All special collections REQUESTs will go through CDL (with notes in the record that the item is non-circulating, not loan-able). All special collections libraries will participate, except for the Clark Library. These requests will go into a review file for ILL staff to review and then consult with the appropriate Special Collections unit. The units, as always, have the option to approve or reject the request.

It is agreed that ILL units shall keep records on these requests, noting whether the request was approved or rejected. Paper copies of the CDL request will serve as the record. IAG will review the project at six months and at twelve months.

The REQUEST team will need to draft messages for Melvyl (announcing the inclusion of special collections requests) and IAG recommends that the Project be in place by March 14, 2001, to coincide with Spring Quarter for those on the Quarter System.

Issues regarding loans of special collections:

1. The lender will specify where the special collections material can be used.
2. Shipping: ILL will follow procedures specified by the Special Collections unit.
3. It is suggested a form accompany each item loaned, with instructions on where it will be used, whether it is OK to photocopy, etc.
4. ILL statistics: send data to Tammy (at 6 months and at 12 mos.). Keep a copy of the CDL request and include the decision (approved/not approved). Send Tammy only CDL requests, not anything else.

7. Tricor

Gary reminded everyone that ILL should be using plastic bags for all Tricor shipments through March.

Gail provided information on the Tricor problem reports. 209 problems have been reported. Of these, 188 problems were packing/shipping problems due to UC staff errors.

The current contract expires on 07/31/01, so it is time to begin working on modifications and wording changes for the new contract. Gary asked everyone to be thinking about issues that we might want to bring up for the new contract. Time issue (morning deliveries don't arrive early enough) seems to be the one consistent complaint from ILL units. UCB has specifically asked that its contracted morning delivery time return to 9:00 a.m.

8. Mellon Proposal: Collection Management Initiative (Rubens)

Rubens announced that a UC proposal has been accepted by the Mellon Foundation. The Collection Management Initiative (CMI) will be funded by Mellon to study use of electronic journals vs. print journals. In particular, the project will gather data on user satisfaction or dissatisfaction with electronic journal access. UC will select 400 journal titles in several disciplines. Complete runs of print copies will be stored at the RLFs, with access provided by the electronic versions. The project will study reasons why users request the paper copy.

The CMI project will continue for 2-3 years. Project manager is Cecily Johns, and she will be visiting each campus to explain the project. Information on this project is available at http://www.slp.ucop.edu/initiatives/CMI_Proposal.htm

9. German Resources Project

Janet Moores asked if anyone was participating in ARL's German Resources Project. Participants will be provided with ARL's ILL Manager program. There was no interest among this group, including those participating in the project.

10. Campus updates.

The meeting concluded with a round robin of various campus updates.

revised 03/09/01