

University of California  
Resource Sharing Committee  
Interlibrary Loan Advisory Group

In-Person Meeting October 24, 2002  
Irvine.

Attending: Charlotte Rubens (UCB), Chris Dechoretz (UCD), Pam La Zarr (UCI), Linda Weinberger (UCI), Bob Freel (UCLA), Claire Bellanti (RSC Liaison), Colleen Carlton (SRLF), Ann Harlow (UCR – recorder), Barbara Slater (UCSD), Gary Johnson (UCSB), Jennifer Walker (UCSC), Terri Mason (UCSF), Rose Harrington (Stanford)

Gary Johnson chaired the meeting in Kerry Scott's absence.

1. Introductions
2. Announcements
  - A. Items sent in Tricor are to be wrapped in plastic bags from November 1, 2002 to May 1, 2003.
  - B. The new IAG Website looks great. IAG members are asked to confirm the accuracy of their campus's information and forward corrections to Kerry Scott by November 15, 2002. IAG Web site will be linked to the new RSC and SOPAG. The old IAG Web page will be terminated.
3. Minutes for August 1, 2002 were approved.
4. Next year's conference calls will be from 1-3 p.m. on Thursdays on the following dates: January 30, April 10, and July 17. The next in-person meeting will be October 23, 2003.
5. Bob Freel has agreed to become the new RSC-IAG co-chair for 2003 beginning January 1st. Kerry Scott will continue to be IAG Chair for 2003.
6. RSC Updates
  - A. The ILL/Special Collection post-Pilot Project Survey was discussed and a number of suggestions were added to the list of survey questions. Claire will forward these suggestions to Deborah Turner. IAG also asked that the already compiled quantitative information be presented to ILL and Special Collections before these two groups meet to complete the qualitative survey.
  - B. The Tricor contract is being renegotiated. Tammy will put out a call soon to IAG for information regarding modifications to the contract. Santa Barbara still would like to get their shipments earlier in the day.
  - C. RSC Goals and Objectives were reviewed without additional comment with the exception of Goal 1e.
  - D. IAG discussed RSC Goals and Objectives, Goal 1e, Review ILL Loan Periods. Medical libraries reaffirmed their need for shorter due dates. Loan periods will be re-evaluated when VDX is broadly implemented within the UC. Based on the lending pattern demonstrated by SRLF, Santa Barbara circulates most items for 1 year to other UC Interlibrary Loan Offices. Most items (95%) are returned early. (They have been renewing 1 time for 3 months but have decided to not renew after 1 year). They feel it has been very successful with much less time spent on processing overdue items and renewal requests. They are lending outside of UC for 3 months with the same benefit of reduced overdue and renewal notice processing. There is not an increase in lost items. It was agreed that all libraries borrowing from UCSB would continue to adjust the loan period to match local patron's borrowing category loan period.

- 7 HOTS re: separate monograph records for electronic and print copies. Claire sent email to Mary Heath and RSC against proposal. IAG endorses RSC recommendation not to separate records. We suggest a dialogue between HOTS & HOPS. Barbara Slater will draft our comments.
8. Lost Materials: It was agreed that owning libraries should contact the designated borrowing library contact person by phone or e-mail before submitting a recharge for the cost of a lost item. Some discussion regarding not billing other UC libraries at all. Tabled for discussion at a future date.
9. Questions were raised concerning UC libraries recharging other UC libraries for special services. Charlotte explained that UCB recharges campuses for microfilm copies of Masters and PhD theses which it produces at the request of other UC libraries in cases where there is no circulating copy. UCB is charged for the reproduction service and passes the cost along to the requesting UC library through the recharge process. In addition, UCB charges for replacement copying, which requires special handling. The other UC libraries present indicated none of them charges for replacement copying. Bob Freel questioned why the ICF fund is not used to cover these costs. Charlotte will investigate further.
10. Question regarding Special Collection Units digitizing non-lendable, out of copyright materials. It was decided to readdress this in a future conference call. Hopefully this will be supported by the ILL/SpCol survey.
11. ORIGINAL: There is a new list on CDL for licensing agreements that now allow lending to print from electronic periodicals. The only CDL agreement that does not allow lending is JSTOR but this may change. Supplying ILL documents from e-journals excludes lending to for-profit libraries. CDL's intent is to only accept licenses that agree with this policy.

COMMENT: concern was raised that # 11 not be used as a policy statement.

12. UC will begin to participate in EFTS, the Electronic Funds Transfer System. EFTS is the transaction based electronic billing system for DOCLINE. UC medical Resource Libraries at UCLA, UCSD, UCSF, UCD, and UCI will participate using QuickDoc, Clio, or the EFTS File Builder Program. Firm implementation dates have not yet been set. EFTS will eventually work with VDX.
13. Distance Education. In September 2003, UC Irvine will begin a Distance Education program offering a Criminology, Law and Society MAS. Returnables will be sent via courier to the graduate students with a return label provided. Nonreturnables will be provided via the Web whenever possible. Costs will be tracked by UCI ILL and covered by the Distance Education program. IAG members agreed to fill these requests as routine UC ILL transactions.
14. CBS/VDX--- UCLA, UCSD and UCSB are waiting for adjustments to be made to the Web interface. The latest are to the picklist, book bands, IFM and patron authentications. There was a discussion on when and how the other UC libraries will be brought up. Barbara Slater said it take a large amount of change in training and work flow. But we won't know how much until the final product is set. That is taking more time than expected and perhaps having an ILL person at CDL might help. UCB and UCD Medical Library offered a staff member. Claire Bellanti will talk to Mary Heath with the offer.
15. Desktop Delivery (DTD) --UCSC, UCI, UCR, UCLA (ALL of UCLA ILL units), UCSB are participating. Jutta Wiemhoff's suggestion of creating a self-help answering site on the Web for users with DTD problems was unanimously endorsed. UCSC suggested an embedded link in the email message the patron receives which would direct the user to the self-help site. UCSC will create this

Web site. This site may be linked to the IAG Web site. Please send any suggestions concerning the content of the self-help site for DTD to Jennifer Walker ([jmwalker@ucsc.edu](mailto:jmwalker@ucsc.edu)) by November 15.

16. ARL ILL/DD--UCLA, UCB, UCSD, UCSB, UCD, UCSC and SRLF are participating in the study. There has been no news on the study yet.
17. Pam La Zarr reported that beginning in early November UC Irvine Technical Services will begin updating holdings online on OCLC at the point of order for firm orders only. Some ILL requests will come in for titles that have been firm ordered, but not actually received. IAG members agreed UCI Lending could provide the "Reason for No" with the Conditional response of "Not yet received."
18. Discussion on Direct Request. Some units at UCLA are putting the requests in for the patron using Direct Request. This is not an option for UCD and UCSB as encrypted PIN numbers are used by patrons to use Melvyl Request.