University of California Interlibrary Loan Advisory Group (IAG)
To the Resource Sharing Committee (RSC)
In Person Meeting, October 23, 2003
UCLA Biomedical Library

Present: Charlotte Rubens (UCB), Christine Dechoretz (UCD-recorder), Pamela La Zarr (UCI), Linda Michelle Weinberger (UCI), Bob Freel, Chair (UCLA), Colleen Carlton (SRLF), Anne Harlow (UCR), Janet Moores (UCR), Barbara Slater (UCSD), Gary Johnson (UCSB), Jennifer Walker (UCSC), Terri Mason (UCSF), Jutta Wiemhoff (NRLF), Rose Harrington (Stanford.)

Absent: Claire Bellanti (RSC Liaison)

1. Approval of July 17, 2003 minutes

Minutes were approved with minor corrections.

2. Recommendations on the UC Request Special Collections

Many questions arose during the discussion of the documents. The members wondered whose recommendations these were, who was to implement them, and when they were to be implemented. They also wondered if this was just a compilation of responses. There was a general consensus that the report could be strengthened and be more explicit. The group came up with several recommendations that Charlotte, as IAG's new RSC Liaison, would draft and take to RSC.

3. RSC's assignment for IAG

Charlotte Rubens, IAG's new RSC Liaison gave the group a heads-up regarding the dim archive to be held at the RLFs'. IAG will need to develop procedures for accessing these materials. SRLF began processing the Elsevier titles in October and staff will start on the ACCM titles in November. There will be a six-month assessment period. IAG's concerns centered on damage to the material and loss when items needed to be retrieved for physical inspection of the print copy.

4. IAG Goals

2002/03 goals were reviewed to assess their accomplishment. Status of the goals are attached to the bottom of these minutes.

2003/04 goals were discussed. Two main ones were identified:

VDX Implementation

RSC-IAG immediate goal is implement VDX at all campuses. Once implemented at all campuses, IAG will begin developing priorities for enhancements and working on refinements.

Web Delivery
RSC-IAG would like to develop a list of best practices for web delivery.
Included in this effort are standards and expectations on scanning.

Bob will forward to RSC.

5. VDX update and next steps and 7 Citation Linker (combined)

Gary gave an update on VDX and an introduction to the features of Citation Linker. UCLA, UCSB and SRLF went live on October 2 in borrowing with all CDL and UC E-Links requests going directly to VDX. Staff are inputting all others into VDX. Web requests have been replaced with the Citation Linker form. If Citation Linker doesn't work (patron block, item owned yet missing or serial volume lacking) patrons get the CDL Request problem message. VDX differs from Request in that it does not look at holdings or recognize duplicate requests. The upcoming VDX upgrade will attach the OCLC accession number. Barcodes are in the current version, but CDL has not implemented that functionality yet. Crystal Reports will need to be used for statistics and billing. Clio is not ISO compliant so it will not work with VDX. VDX version 2.4 has robust copyright tracking. In development are duplicate request checking, overdue notices and barcodes. IAG suggested further revisions to Citation Linker form.

6. Peer2Peer

It's time to begin thinking about it, but discussion was postponed to a future meeting.

8. IAG co-chair election (Northern representative needed)

Terri Mason (UCSF) volunteered and was unanimously accepted. Her term begins January 1, 2004.

9. IAG website

The new page conforms with SOPAG's desire to have a uniform look. Bob will manage updates.

10. Desktop Delivery (DTD) updates

All campuses, with the exception of UCD who has set a November 1 target date, are providing DTD with no significant problems

11. ARL ILL/DD study reports.

Charlotte reported that the ARL average cost of borrowing was $17.50 per request and average lending cost was $9.27 per request. UCLA participated and was below the mean. UCB also participated, but was above the mean. UCSD Social Sciences and Humanities participated, but results were not reported.

12. User privacy issues

Bob called the group's attention to SB1386, Breach in Confidentiality regarding SSNs, CDLs and credit card numbers.

13. Future meeting schedule will be confirmed via e-mail

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1. Goal: Identify and discuss policy issues and recommend best practices that facilitate resource sharing among campuses.

1a. Objective: Implement the Consortial Borrowing Software product.

Status: RSC has been an integral part of the process of implementing Fretwell-Downing's VDX, the consortial borrowing software. The first stages of implementation involved a high level of account setup, software configuration, and testing. Three campuses are scheduled to "go live" in the fall with the remaining campuses to come up throughout the remainder of the academic year. Once implementation is complete RSC will evaluate resource-sharing activities.

UPDATE: As of October 1, 2003, two campuses and a RLF began using VDX for borrowing, and another campus and RLF are planning on implementing shortly. The remaining campuses plan to implement this year.

1b. Objective: Implement the Request feature in the new Melvyl catalog and CDL databases.

Status: RSC and RSC-IAG continue to be involved in the implementation and testing of Request in the new system.

Completed.

1c. Objective: Evaluate pilot project to unblock REQUEST for Special Collections materials.

Status: This project has been a cooperative effort between HOSC and RSC. The pilot was conducted from June 2001 through June 2002. RSC will prepare an evaluation report to be completed in fall 2002. The report will include recommendations for future activity. RSC is considering a second survey to evaluate the qualitative aspects of the pilot.

UPDATE: RSC has compiled a report with data provided by each of the campus liaisons. RSC will discuss the recommendations from that report on October 27, 2003.

Note: IAG reviewed the recommendations and has several comments. Charlotte Rubins will share those comments with RSC at the October 27, 2003 meeting.

1d. Objective: Implement Desktop Delivery at all campuses.

Status: The project is ongoing with many campuses participating. High-end scanners were purchased for each campus using systemwide monies. The Request screen was modified to alert users to the option of desktop delivery. As the VDX software remains an issue most campuses have a local version of this service as we wait for a system-wide plan to solidify/stabilize.

UPDATE: All but one campus is providing web delivery. The one remaining campus anticipates offering web delivery in November 2003.

1e. Objective: Review ILL Loan Periods.

Status: RSC asked RSC-IAG to review the length of loan periods between institutions for ILL with consideration to increasing the length of the loan. RSC-IAG has requested to reconsider the issue when the VDX software is fully implemented. Depending on the status of VDX implementation, a review may take place in spring/summer 2003.

UPDATE: RSC-IAG will review institutional loan periods after all campuses have implemented VDX and feel comfortable with the new system.

2. Goal: Coordinate communication on UC resource sharing issues with interlibrary services, circulation, collection development, special collections, technical services, and other groups as appropriate.

2a. Objective: CAG Best Practices Workshop.

Status: The CAG is developing a proposal for a best practices workshop which will be reviewed by RSC and forwarded to SOPAG for approval.

2b Objective: Respond to requests for comment by All-Campus Groups.

Status: RSC has taken an active role in responding to reports from other All-Campus Groups. RSC will actively investigate opportunities for collaboration, such as a joint eReserves program with HOPS.

3. Goal: Identify and analyze barriers to expeditious sharing of materials and recommend solutions to remove these barriers. This may include identifying new methods of resource sharing, consideration of local circulation policies that affect resource sharing and facilitating movement of materials among the campuses.

3a. Objective: Investigate methods of improving access to materials in storage facilities.

Status: This objective has been identified as an issue that needs investigation. A task force will be formed this winter to review the issue.

3b. Objective: Review new technologies for providing digital images of microformat materials.

Status: A task force has been assigned to review existing and new technologies. A proposal is in process.

3c. Objective: Review Tricor contract with the feasibility and cost of increasing use of collections in libraries who are currently not part of the contract (i.e. Law libraries, UC managed Labs, etc.).

Status: The current contract expires December 2002. T. Dearie is investigating options for adding other participants.

3d. Objective: Blocking UC Individuals at the Home Campus.

Status: A CAG sub-team composed of Andy Panado (Chair, UCSF), Claire Bellanti (RSC Liaison, UCLA/SRLF), Sharla Desens (UCR), Diane III Keen (UCR), Lucia MacLean (UCD), Jon Edmundson (SRLF) has been developing a proposal to block on the home campus the library privileges of UC individuals who abuse their circulation borrowing privileges at other UC campuses. The report has been submitted to SOPAG and is under review.

3e. Objective: Review External User policies

Status: CAG is reviewing policies granted to external users in an effort to standardize practices and create common understandings. The report has been delayed and is now expected winter 2002/2003.

4. Goal: Coordinate collection, organization of and systemwide reporting of UC ILL/Resource Sharing statistics.

4a. Objective: Develop more efficient methods of reporting UC ILL statistics

Status: RSC will undertake this work in the coming year in consultation with Gary Lawrence and CDL staff to incorporate the statistical portion of VDX.