

Recorder: Santa Cruz (SRLF as backup)  
Call Instructions: Dial: 866-740-1260  
PassCode: 5341271  
Problem Connecting: 800-843-9166

---

## 1. Roll Call & Announcements

Berkeley	Davis – J. Newborn	Irvine – G. Lopez
Los Angeles – R. Freel & J. Lee	Merced – D. Sawatzky	Riverside – V. Novoa & J. Moores
San Diego – K. Goodson	San Francisco – A. Asbury	Santa Barbara – S. Hathaway
Santa Cruz – J. Alper & S.Troy	NRLF – J. Wiemhoff	SRLF – J. Edmondson
CDL/UCOP – L. Wolf	Stanford – R. Harrington	

### 1.1. Additional Agenda Items?

- Scott Hathaway brought up an item from the last ILL Operations Team conference call with regard to the UC e-Links Request form. The “I will no longer need...” field has an ‘after 5-day choice.’ The group discussed whether this option should be eliminated from the form. Feelings were mixed and ultimately it was decided to continue with the status quo. *(Added as Item 7 below)*

### 1.2. Announcements

- Thanks to Bob Freel (UCLA) for his excellent leadership in 2009-2010.
- Welcome to Leslie Wolf (CDL).
- Welcome to Charlotte Rubens (UCB) as new Vice-Chair.
- DRAFT annual report has been distributed for feedback; please review and comment.

## 2. RSC update (Vince Novoa)

- Leslie Wolf was welcomed to the RSC group and Jason Newborn is the new RSC representative from UC Davis. Marlayna Christensen will be leaving RSC and vacating the chair position. SOPAG will be selecting a new chair, possibly someone from a northern UC. Timeline is uncertain yet.
- Gary Johnson gave RSC a Shared Print Task Force update. The task force sent a report (not currently ready for broader review) to the Collections Development Committee and may regroup following the report’s review.
- The ILL Satisfaction Survey was discussed.
- The emergency listserv was discussed. To be included in the list (for sharing information regarding disaster/emergency response), submit names to Marlayna Christensen.
- Loan periods were discussed. The group decided not to take any further action at this time.
- Gary Johnson presented on “green” ILL licenses.
- TRICOR was discussed. No action needed at this time.

## 3. CDL Update (Leslie Wolf)

- **People News:**
  - We’re happy to report than Sherry Willhite has returned from leave. Her role has changed to provide longer-term analytical support to the Request Service and other key initiatives at CDL. Leslie Wolf has replaced Sherry on RSC and IAG. (Check out Leslie’s staff profile and photo at [http://www.cdlib.org/contact/staff\\_directory/lwolf.html](http://www.cdlib.org/contact/staff_directory/lwolf.html)).
- **CDL ILL Operations Team:**
  - The CDL ILL Operations Team has been meeting monthly since October 2009; we also communicate via wiki and listserv. In addition to extensive work on the VDX 4.1.2 upgrade (see below), the team gave feedback to

OCLC on specification for the brokering function in a future release; saw a presentation on how ILL staff could use the ERMS portal; and continued to advise us on the needs of the campus ILL units.

- CDL ILL Operations Team members are: Scott Hathaway, Debbie Cox, Elissa Mondschein, Jon Edmondson, Jenny Lee, Alicia Amador, Sherry Willhite, Alison Ray, Bob Brandriff, Debra Bartling, and Leslie Wolf (chair).
- **Upgrade to VDX 4.1.2:**
  - CDL is working closely with the CDL ILL Operations Team and OCLC to upgrade VDX to version 4.1.2. This new release will include electronic document delivery and a number of enhancements to both VDX and My ILL Requests. We are tentatively planning a campus preview in June. CDL ILL Operations Team members previewed an early release last fall – special thanks to Scott Hathaway and Debbie Cox for their intensive reviews.
- **Next Gen Melvyl:**
  - On March 2, 2010, the NGM pilot began using the back-end of UC's Request Service rather than using current Melvyl. CDL and campus staff evaluated the system by performing rigorous functional, performance, and end-to-end testing. CDL is actively monitoring the service to identify and address issues as they're uncovered.

#### 4. **Affiliated hospitals webpage (Bob Freel):** Need for and accuracy of the list.

- The link to the Affiliated Hospitals webpage from the IAG site was not working, but has been fixed.
- Bob called for any edits needed to this page, such as elimination of any hospitals that no longer exist.
- We discussed procedures for how affiliated hospitals should request items from other UCs. It was decided that these hospitals should make a note in the request stating that they are affiliated with a UC.
- Comments and corrections should be sent to Bob Freel by Friday, April 23. Bob will send out a draft the following week.

#### 5. **UC-wide FAQ webpage on ILL basics**

- Introduced at Southern UC ILL meeting 2010 and through ILL survey results.
- Could point users or public service staff to it for issues such as 'why does it take so long to get my requests' / 'why can't I renew' / length of loan periods / etc.
- Hosted at CDL?
- See developing list of existing campus ILL general FAQ pages; lots of overlap and commonalities.
- Any volunteers to identify common questions and draft possible responses?
  - The idea was proposed to produce a system-wide ILL FAQ page (possibly to be hosted @ CDL), as described above.
  - Bob Freel proposed a 1<sup>st</sup> step to draft a training checklist based on what Access Services staff need to know about ILL, as well as putting together a list of the common questions about ILL service to address main issues of confusion.
  - Bob, Leslie, Josh, Gerry, and Scott are all set to convene via e-mail with the goal of providing some documentation by the July 2010 IAG conference call.

#### 6. **Frequency of conducting ILL user satisfaction survey**

- We discussed how often to run the ILL satisfaction survey. The general consensus was to run it every two years (next in October 2011), with campuses again having the option of whether to participate.
- We also discussed what to do with the results of the survey. Kymberly noted that San Diego hopes to use the open ended comments to guide training and improve their workflows to facilitate more consistent communication between staff and users.

#### 7. **Draft IAG goals for 2010-2011:** Possibilities to consider...

- Continue processing and discussing results of Fall 2009 ILL User Satisfaction Survey; consider any collective issues to be addressed; work with CDL on any possible technical upgrades or interface changes
- Plan to conduct the ILL User Satisfaction Survey again in the Fall of 2011 [or 2012]?
- Develop a unified UC-wide FAQ webpage on ILL basics for use by library staff and patrons?

- Revisit/review ILL loan periods for all UCs?
  - Continue to analyze the impact of Next Gen Melvyl on ILL traffic and full implementation of Request within Next Gen?
  - Follow activity related to UC's Shared Print Task Force, determining and addressing any potential impacts on ILL?
  - Other ideas or horizon issues?
- We went over a variety of potential goals as listed above. It was decided that we would hold off on discussing UC-wide uniform loan periods as per the RSC meeting and CAG.
  - Bob suggested we eliminate analyzing the impact of Next Gen Melvyl until or unless we see an impact warranting investigation.
  - Bob also suggested excluding the Shared Print Task Force unless some related action is later required of IAG.
  - Bob proposed adding a general goal along the lines of "To participate in the improvement and exploration" of interlibrary loan services.
  - Any additional comments can be sent to Kymberly Goodson at any time. Goals will be finalized by mid-June for inclusion in the annual report.

**7. Additional Item: 'I will no longer need...' field in the request form (Scott Hathaway)**

- The last ILL Operations Team included discussion about the "I will no longer need this item after 5 days" option. Debate ensued over whether the '5 day option' should appear. It was noted that this does not change the expiry date and just adds a note to the request, which can be easily overlooked. The value of the option for copy/non-returnable items was also noted.
- Some favored eliminating the option, as it may create unrealistic expectations for patrons and muddies the waters in OCLC, as the note's continually being sent to OCLC can cause confusion with OCLC.
- Others favored the 5 day option, as it can eliminate work on requests that are no longer needed by the patron.
- Discussion included how patrons might be interpreting this option (is this for Rush Service OR merely stating that they will no longer need this item after 5 days).
- In general, units tended to ignore this message when working on these requests and will still continue to try to acquire the item.
- Overall consensus was not reached, except to leave the option on the form as it is.
- Members agreed, however, that an explanation of this '5 day' message would be a great addition to the ILL FAQ webpage, and possibly, to the form near the option itself.

**NEXT CONFERENCE CALLS:**

<b>Date</b>	<b>Meeting Time</b>	<b>Location</b>	<b>Recorder</b>
July 21, 2010	1 pm – 3 pm	Conference Call	Southern Regional Library Facility
October 21, 2010	1 pm – 3 pm	Conference Call	Berkeley
January 19, 2011	2 pm – 4 pm	Conference Call	Davis
April 21, 2011	2 pm – 4 pm	Conference Call	Irvine
July 21, 2011	2 pm – 4 pm	Conference Call	Los Angeles
October 20, 2011	2 pm – 4 pm	Conference Call	Merced