Resource Sharing Committee – Interlibrary Loan Advisory Group (RSC-IAG)
Annual Report, FY 2009/10
Respectfully submitted on June 11, 2010 by Kymberly Goodson, Chair

Progress Report on Goals & Objectives for 2009/10

1. **Continue moving system-wide ILL User Satisfaction Survey forward: Perform survey; distribute results to individual campuses; analyze results of survey to determine if current practice and communication mechanisms meet user expectations and needs; and prepare summary report of results.**

   The final version of the survey was established, following extensive review and comment by IAG, RSC, HOPS, and SOPAG. IRB (human subjects research) issues were investigated and addressed. All 10 campuses were invited to participate in the survey, which was ultimately conducted in October/November 2009 at 5 campuses (UCR, UCLA, UCSC, UCSD, UCB).

   Both quantitative & qualitative survey results were distributed to respective campuses in November 2009 for review by the AULs who approved survey participation. Evaluation of results then began at individual participating campuses.

   Following approval from the designated AULs, a summary of quantitative survey results was distributed to IAG and RSC in January/February 2010. A preliminary summary and assessment was prepared, presented, and discussed at the Southern UC ILL meeting held at UCR in March 2010.

   Analysis of the survey results continues. Campuses that participated in the survey will work with IAG in preparing an action list. Data relevant to system-wide services such as Request has already been shared with CDL. CDL will be consulted as the action list moves forward.

2. **Continue to analyze the impact of Next Gen Melvyl on ILL traffic.**

   As reported in IAG's 2008-2009 annual report updates…"Led by Jason Newborn, IAG began analyzing Patron Initiated Request Source Data. Preliminary data suggest that there has been no or little impact on ILL traffic because of the Next-Gen Melvyl Pilot." Interest in any impacts that the move from Classic to Next Gen Melvyl may present remains high. As noted above, CDL is able to determine the initial source of requests through UC eLinks and can generate such reports as needed to facilitate monitoring of request volume.

   On March 2, 2010, the back-end of UC's Request service was switched to OCLC for Next Gen Melvyl, alleviating several problems that appeared since the launch of the WorldCat Local pilot. For example, reconciling items between WCL's front-end and Melvyl's back-end caused problems for ILL staff. Additionally, 10- and 13-digit ISBN numbers were occasionally not matching consistently. Both issues have been now resolved.

   One issue that remains concerns monographic series first identified by NRLF, who, along with SRLF, receives a large portion of Requests. In a few cases, OCLC is improperly matching monographs as parts of monographic series, producing erroneous results. OCLC and CDL continue to investigate the issue and to consider how to remedy it.

   IAG intends to continue to watch for possible impacts on ILL staff or users resulting from the move toward full implementation of Next Gen Melvyl. No significant impact on request volume has yet been felt. However, while Next Gen Melvyl allows users to discover more records, not all are available via ILL. For example:

   - New imprints that are only available from the publisher and are not yet held in institutions.
   - Current imprints that institutions will not loan.
   - Special collection or reserve materials not available for loan.

   Additionally, users occasionally request materials from a record where no item is available such as an e-textbook. However, staff can find another record for the print item. Libraries may experience a slight increase in their unfilled rates and additional staff time may be required in reviewing requests.

3. **Provide support to the new ILL Operations Team. Promote communication among staff at all levels across the UC system, via the ucvdx-listserv and other means.**

   In the spring of 2009, several members of IAG served on a task group to propose a new team to manage the ongoing needs of CDL managed ILL services and to replace the VDX Implementation Task Force. The task group's proposal was submitted in June 2009 to RSC, and moved forward for SOPAG approval prior to the CDL ILL Operations Team's formal establishment and launch in October 2009. IAG at large has offered feedback and endorsement throughout this transition and fully supports the new group and its modified role. One related change that IAG has been able to promote in particular is the more widespread use of the ucvdx listserv by all UC ILL staff to enable greater communication, exchange of information and expertise, and participation by staff within the UC ILL community.

4. **Provide a statement to CDL in support of "Green" ILL practice. Negotiating licenses that allow libraries to use the online article, instead of first printing, will reduce consumable and save staff time.**

   Issues related to the "greening of ILL" (including both inefficient use of staff time and material waste for paper, toner, equipment use, etc.) continued to be of interest to UC ILL throughout the year, with momentum building as well on a nationwide scale. For example, a new study on "greening" ILL practices, co-sponsored by OCLC Research and OCLC Delivery Services, was presented at the OCLC Resource Sharing Users Group meeting at ALA Midwinter in January 2010 (slides at http://www.oclc.org/research/events/2010-01-15a.pdf).

   RSC has taken a lead role in this, continuing to work toward having licenses for those e-materials requiring "print copy of electronic only" allow ILL to provide electronic copies to patrons without going through the print and scan steps. In support of these efforts, at RSC's request, IAG submitted a formal statement of support for greening initiatives in October 2009. Acknowledging potential savings in labor and supplies from changes to current practice, the statement begins, "In the interest of reducing consumables and improving efficiencies with interlibrary lending workflow, IAG supports the exploration among stakeholders of the possibility of sending publisher PDF's directly to requesting institutions…"

5. **Administrative Changes**

   At RSC's request and in order to unify chairship dates among the all-campus groups, IAG shifted its chair rotation schedule from calendar year to fiscal year. Full transition to the new rotation schedule will be complete in 2010/11.

   Furthermore, the method for designating IAG chairs moved from election to appointment by campus in alphabetical order. Transition to new appointment schedule will begin with Berkeley in 2011-12, following UCSD's term as chair during 2010-11.

6. **Other Accomplishments**

   - UC Riverside hosted the Southern UC ILL Meeting on March 23, 2010. Janet Moores coordinated broadcast of this meeting using WebEx software which enabled participation by three northern campuses.

Goals and Objectives for 2010/11

   - Continue analyzing results of Fall 2009 ILL User Satisfaction Survey; Explore how collective issues can be addressed; Consult with CDL as appropriate.
   - Explore the possibility of conducting the ILL User Satisfaction Survey again in the Fall of 2011.
   - Develop a UC-wide ILL training checklist for Access Services and other staff, possibly including a shared FAQ webpage on ILL basics.
   - Cooperate with the ILL Operations Team and CDL in the preview, testing, and [possible] implementation of the next version of VDX (4.1x).
   - Participate in the exploration, implementation, and assessment of existing or new services as part of ongoing system wide discussions.