Resource Sharing Committee – Interlibrary Loan Advisory Group (RSC-IAG)
Annual Report, FY 2010/11
Respectfully submitted on June 15, 2011 by Kymberly Goodson, Chair

Progress Report on Goals & Objectives for 2010/11

1. **Continue analyzing results of Fall 2009 ILL User Satisfaction Survey; Explore how collective issues can be addressed; Consult with CDL as appropriate.**

   Campuses that participated in the survey have been able to use their survey results to inform operational changes in their local units. CDL was also able to use the results from all participating campuses to see where system-wide changes might be appropriate or desirable. One collective response is being explored with the UC-wide ILL training checklist/FAQ that is outlined in #3 below.

2. **Explore the possibility of conducting the ILL User Satisfaction Survey again in the Fall of 2011.**

   The first such survey was conducted at 5 UCs (UCR, UCLA, UCSC, UCSD, UCB) in October/November 2009. Both quantitative & qualitative survey results were distributed thereafter to IAG and RSC members, and to library administration at the participating campuses. In April 2010, IAG discussed the value of the survey and agreed upon a schedule of running it every two years. Therefore, the survey should next be conducted in the fall of 2011. As in 2009, participation by the campuses will be optional. In order to gauge patron satisfaction over time, the same set of questions should be used for the second survey instance as were included in the 2009 survey. Furthermore, campuses who choose to participate in the survey must also decide whether to complete IRB/human subjects research paperwork, understanding that exemptions were approved for the survey in 2009 for some participating campuses. Although planning required for the second implementation of the survey is significantly lessened over the 2009 instance, campuses should begin to consider whether to participate in Fall 2011 and should seek approval from their library administration by the end of September or so for a survey launch in October/November.

3. **Develop a UC-wide ILL training checklist for Access Services and other staff, possibly including a shared FAQ webpage on ILL basics.**

   Following a change in leadership of the group which caused a slowing of its initial momentum, a small task group has worked on this as time has permitted, and continues to progress toward this goal. The new task leader gave a brief presentation at the IAG in-person meeting in Fall 2010, after which the group brainstormed some elements to include on such a checklist, including general policies and practices such as turnaround time, eligibility, the My ILL service, loan periods and renewals, reserves, types of materials permitted, etc. A list of existing campus ILL general FAQ pages was also developed to identify overlap and commonalities in content, and to highlight information to be included in the new training checklist.

   Such a shared document could help new ILL staff, non-ILL staff, and patrons throughout UC to more easily locate general ILL information and to seamlessly access more specific, local ILL details for campuses across the system.

   A possible mockup of such a shared document has been developed. A few of the questions remaining for consideration include:

   1. Who will maintain the information and update as needed?
   2. Where will this FAQ page reside?
   3. Who would you use this website and to what extent?
   4. Are we still committed to this project?

4. **Cooperate with the ILL Operations Team and CDL in the preview, testing, and [possible] implementation of the next version of VDX (5x).**

IAG members, as well as others across the UC ILL community, actively participated in planning, testing, and implementation of VDX 4.1. Furthermore, as was hoped, the UC ILL community has adopted more widespread and frequent use of the ucvdx listserv by all UC ILL staff to enable greater communication, troubleshooting, and exchange of information and expertise – both when preparing for upgrades as well as for regular operations. With 4.1 currently in place, there will be some downtime before any upgrade to 5x, which is planned for late 2012 at the earliest.

5. **Participate in the exploration, implementation, and assessment of existing or new services as part of ongoing system wide discussions.**

   - IAG reviewed documents and proposals related to RSC's investigation of a new courier service.
   - The committee explored and began to adopt VDX Document Store. UCI, UCLA, UCR, UCSD, UCSB, UCB, and UCD Shields Library are now using VDX document delivery for both borrowing and lending. Both RLF's are also using VDX document delivery for lending.
   - Furthermore, 2 IAG members, Jenny Lee of UCLA and Scott Hathaway of UCSB, presented a two webinars on VDX Document Delivery (Beginner in December 2010 & Advanced in May 2011) in which all UC ILL staff were encouraged to participate and to submit questions or discussion topics in advance.

6. **Administrative Changes**

   - Longtime IAG member Bob Freel left the group in mid-2010 to be the UCLA representative to RSC due to Don Sloane's retirement.
   - Longtime IAG member and immediate past chair, Kymberly Goodson, will leave the group in July 2011 as a result of her previously revised position at UCSD. Judea D'Arnaud will join IAG as the UCSD representative.

7. **Other Accomplishments & Activities**

   - 43 people attended the Southern UC ILL Meeting (33 in-person and 10 virtually), which was hosted by UC Los Angeles on March 23, 2011.
   - The committee held 3 conference calls and met in-person once (in Fall 2010 at UCB).

Goals and Objectives for 2011/12

   - Move toward full adoption by all campuses of VDX's Document Store for both borrowing and lending.
   - Conduct the ILL User Satisfaction Survey again in the Fall of 2011, sharing results widely thereafter, comparing them to the 2009 results, and using the results at individual campuses and perhaps UC-wide to enhance ILL services and technologies.
   - Finalize a UC-wide ILL training checklist for Access Services and other staff, possibly including a shared FAQ webpage on ILL basics.
   - Keep each other abreast of budgetary impacts and actions at each campus, particularly as they relate to resource sharing.
   - Participate in the exploration, implementation, and assessment of existing or new services as part of ongoing system wide discussions, including the maximization of Next Generation Melvyl, as Classic Melvyl is discontinued in Summer 2011.
     o Contribute, as requested by RSC, in its review of ILL operations UC-wide, as outlined in the 4/12/11 "Interlibrary Loan Policy and Procedure" charge from the Council of University Librarians.
     o Continue to monitor RSC's investigation of a new courier service, and any impacts it will have on ILL users.
     o Monitor UC-wide projects such as the Next Generation Tech Services and Shared Print Task Force for any potential impacts on resource sharing.
     o Continue to investigate with LTAG the possibility of Shibbolizing the My ILL service, including identifying benefits and drawbacks for users.