RESOURCE SHARING COMMITTEE (RSC)
Annual Report for October 2006 - September 2007

RSC completed the following activities:

- **Peer-To-Peer Testing**
  - o VDX testing with the National Archive of Canada and Stanford University has gone smoothly.
  - o VDX problems are preventing peer-to-peer with British Library (working on it).
  - o Pursuing peer-to-peer lending at the CSUs. However, the CSUs are currently in the process of selecting a new management system, so peer-to-peer is on the back burner.

- **UC/OCLC Pilot Project Implementation**
  - o Charlotte Rubens has been appointed to the UC/OCLC Pilot Project Implementation Team, and has been working especially on resource sharing issues. Insuring that any next generation system accommodates Request services is a priority.

- **SOPAG/VDX Lessons Learned Meeting**
  - o Participated in the meeting January 2007, which reviewed the VDX Implementation as a UC-wide project. The outcome of the meeting documented key elements to improve the success of similar projects in the future. It was also recommended that, in retrospect, that SOPAG/CDL review current project management structure of the VDX project to assist in completing the VDX implementation.

- **VDX Implementation Team**
  - o RSC recommended to SOPAG to restructured the largely dormant PIR Request Team (a CDL group) and expand its scope to include VDX issues. The new group will continue until a new mechanism for VDX oversight is identified.

- **Document Delivery**
  - o UCSD reviewed alternatives to Ariel. UCSD and UCSB tested viability of Odyssey for DDS, however the free version does not look acceptable based on tests between the two campuses.

Goals & Objectives 2007-2008

1. **GOAL: Identifies and discusses policy issues and recommends best practices that facilitate resource sharing among campuses.**

   1.1. **OBJECTIVE**: Implement the Consortial Borrowing Software product. RSC and its sub-committee, RSC-IAG, has been an integral part of the process of implementing OCLC Pica's VDX, the consortial borrowing software. Once implementation is complete RSC will evaluate resource-sharing activities to ensure development of ongoing communication mechanisms and management of operational issues.

   STATUS: "My ILL Requests" (ZPortal), the patron interface to VDX is implemented at UCI, UCLA, UCM, UCSB, UCSC, and UCSD. UCR and UCSF are currently testing. All campuses and RLFs are currently using VDX for lending to other UC campuses. All campuses except UCB (in testing) are using VDX for borrowing from both other UC campuses and through OCLC. All Campuses, except UCB, UCI, and UCSF are lending to OCLC partners via VDX, but UCI will be lending by end of 2007. Current status on the ZPortal and VDX implementation projects is maintained on the Inside CDL website at http://www.cdlib.org/inside/projects/request/vdx/.

1.2. **OBJECTIVE**: Maintain the Request feature in the current Melvyl catalog, Next Generation Melvyl, and licensed databases.

STATUS: *No changes were implemented pending the "Opt In/Opt Out" proposal. The committee will continue to monitor functionality and review additional needed changes.*

1.3. **OBJECTIVE**: Maintain the existing VDX Task Force or create a similar group to expedite final stages of implementing VDX and to provide a timely communication mechanism for staff and CDL.

STATUS: *VDX Task Force was extended as of January 2007 to continue monitoring and addressing VDX problems and issues.*

1.4. **OBJECTIVE**: Review ILL Loan Periods.

STATUS: Ongoing. Although there has been no movement this year on this issue (campuses that were able to increase the length of their loan periods have already done so), we recommend keeping this objective until VDX is fully implemented at the remaining campuses.

1.5. **OBJECTIVE**: Review UC Resource Sharing in light of the Bibliographic Services Task Force Report, UC/OCLC WorldCat Local pilot project, and any new initiatives the report and project may lead to.

STATUS: *Ongoing pending BSTF progress.*

1.6. **OBJECTIVE**: Promote adoption of NCIP and related standards among UC ILS vendors to facilitate interoperability of circulation-related systems, such communications between ISO ILL systems and local circulation modules.

STATUS: *No progress reported on this task. Will continue pursuing for the coming year.*

1.7. **OBJECTIVE**: Pursue expedited shipping of materials between the UCs and new peer-to-peer lenders.

STATUS: *Investigating possibility of adding the CSUs to Tricor service for all UC campuses. Also reviewing Tricor MOU to ensure that agreement is still agreeable from the UC perspective.*

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

2.1. **OBJECTIVE**: Continue the Circulation Advisory Group's best practices workshops at its annual Circheads meeting. Topics are selected and assigned to campus representatives at annual meeting for presentation the following year.

STATUS: *Topics for the 2007 meeting included: new Reserve fine and blocking structure (UCSB); Billing Practices (UCSD); Emergency Plans and Disaster Practices (UCSD); and a tour of the UCM Kolligian Library. Topics for 2008 meeting (to be held at UCSD) include: Job Descriptions, Supervising Students Best Practices, and Staff Technical Training Needs.*

2.2. **OBJECTIVE**: Take an active role in responding to reports from other All-Campus Groups and investigate opportunities for collaboration, as appropriate.

2.3.   **OBJECTIVE**: Maintain the RSC web sites using guidelines from SOPAG.

2.4.   **OBJECTIVE**: Investigate methods for RSC, IAG, and CAG to securely gather and share information, i.e., wikis, blogs, or other collaborative tools.

3.   **GOAL: Identifies and analyzes barriers to expeditious sharing of materials and recommends 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.**

3.1.   **OBJECTIVE**: Continually review External User policies.

STATUS: *Circulation policies of each campus are available on the CAG web page. CAG has reviewed these policies for accuracy in 2005/06.*

3.2.   **OBJECTIVE**: Respond to developments and tasks of the UC/OCLC Pilot Project Implementation.

3.3.   **OBJECTIVE**: Respond to the Public Services Workshop held in Oakland, August 2007.

3.4.   **OBJECTIVE**: Propose and develop a UC listserv to facilitate communication between campuses regarding emergency and disaster related topics.

3.5.   **OBJECTIVE**: Develop a Resource Sharing Code. Because there continue to be resource sharing issues that need guidelines for staff, RSC will develop a "Resource Sharing Code" for the UCs.

STATUS: Project has stopped and started several times. Will reassess and begin work in post-VDX environment.

3.6.   **OBJECTIVE**: Pursue future Peer-to-Peer Lending with non-UC institutions using ISO-ILL protocol.

STATUS: VDX testing with the National Archive of Canada and Stanford University has gone smoothly. VDX problems are preventing peer-to-peer with British Library (working on it). Pursuing peer-to-peer lending at the CSUs. However, the CSUs are currently in the process of selecting a new management system, so peer-to-peer is on the back burner.

3.7.   **OBJECTIVE**: Monitor and evaluate developments with the Rethinking Resource Sharing Foundation (http://www.rethinkingresourcesharing.net).

4.   **GOAL: Coordinates collection, organization of and system-wide reporting of UC ILL/Resource Sharing statistics.**

4.1.   **OBJECTIVE**: Develop more efficient methods of reporting UC ILL statistics.

STATUS: Substantial work was accomplished by CDL in improving access to statistical information for VDX.

Submitted by Marlayna K. Christensen
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