RESOURCE SHARING COMMITTEE (RSC)

Annual Report for October 2007 – September 2008

RSC COMPLETED THE FOLLOWING ACTIVITIES:

- **Tricor Review**
  - ✓ Reviewed 2007-09 draft of Tricor MOU
  - ✓ Prepared the "Assessment of Potential Cost Savings in the Intercampus Document Delivery Program" report for ULs, February 2008
  - ✓ Identified billing discrepancies for UCSC deliveries, April 2008

- **Emergency Response and Disaster Recovery Workshop**
  - ✓ Gary Johnson (UCSB), Don Sloane (UCLA), Sarah Troy (UCSC), Eric Scott (UCM), and Marlayna Christensen (UCSD) have been developing the workshop proposal to present to SOPAG. A survey was compiled with responses from each campus detailing current emergency and disaster preparedness levels. An invitation to develop the workshop across some of the ACGs was presented to HOPS, LTAG, and PAG. RSC received excellent feedback on improving the scope of the workshop and the refining the proposal.

- **UC/OCLC Next Generation Melvyl Project**
  - ✓ A number of members of RSC, CAG and IAG have participated to bring this project to light, specifically focusing on resource sharing issues and ensuring that any the Request services remain a priority.

- **VDX Implementation Team**
  - ✓ OptIn/OptOut option for Request was rolled out in November 2007, allowing campuses to permit local users to request materials held locally when listed as "not checked out" or "available".
  - ✓ *My ILL Requests* statistics went live on February 21st. User enhancements were loaded to allow the user to sort their requests by due date.
  - ✓ VDX web statistics went live on March 25th.

- **ISO ILL peer-to-peer policy**
- Policy was drafted and revised to provide working guidelines for establishing formal relationships with other ISO compliant libraries or services.

- **TEPS/NPM Project – Taiwan Electronic Periodical Services / National Palace Museum Online**
  - ✓ Began participation in project (March 2008): tracking requests for materials within these databases to report to vendors at end of year.

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: Ongoing. "My ILL Requests" (ZPortal), the patron interface, to VDX is implemented at UCI, UCLA, UCM, UCR, UCSB, UCSC, and UCSD. UCSF is testing. All campuses and RLFs are currently using VDX for lending to other UC campuses. All campuses 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. 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: Opt In/Opt Out was rolled out in November 2007, allowing campuses to permit local users to request materials currently listed as "not checked out" or "available".
    Next Generation Melvyl (NGM) was made public in April 2008 and currently relies on eLinks to transmit requests from NGM to the owning library. Improvements to the request functions in the NGM system are expected in the coming year.

    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: Ongoing. VDX Implementation Team continues to monitor and address 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 Next Generation Melvyl pilot project, and any new initiatives the project may lead to.

    STATUS: Next Generation Melvyl (NGM) was made public in April 2008 and currently relies on eLinks to transmit requests from NGM to the owning library. Improvements to the request

functions in the NGM system are expected in the coming year.

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: *Reviewed new Tricor MOU for shipments between UC campuses. The MOU shows no increase in costs, with the exception of the fuel surcharge. Will continue to seek information and investigate the possibility of adding the CSUs to Tricor service for all UC campuses.*

2. 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.

2.1. **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.*

2.2. **OBJECTIVE**: Respond to developments and tasks of the Next Generation Melvyl Pilot Project Implementation.

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

   STATUS: *Awaiting further outcomes and decisions.*

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

   STATUS: *ongoing. Expected as an outcome of the forthcoming Disaster Response workshop (currently preparing proposal for workshop).*

2.5. **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.*

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

STATUS: UC ISO policy was drafted and revised. Policy is to establish procedures for establishing relationships with other ISO-compliant libraries and suppliers. Proposal will be presented to SOPAG for approval.
VDX problems prevented developing a peer-to-peer relationship with the British Library, but we intend to pursue peer-to-peer lending at the CSUs in the future.

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

STATUS: CDL is a founding member of the RRS Foundation. Sherry Willhite and Marlayna Christensen have been actively been monitoring the group's listserv and other communications.

3. GOAL: COORDINATES COMMUNICATION ON UC RESOURCE SHARING ISSUES WITH INTERLIBRARY SERVICES, CIRCULATION, COLLECTION DEVELOPMENT, SPECIAL COLLECTIONS, TECHNICAL SERVICES, AND OTHER GROUPS AS APPROPRIATE.

3.1. **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 2008 meeting included: job descriptions (UCLA and UCR); supervising students (UCD); staff technical training needs (UCD); and an overview of Next Generation Melvyl (Gary Johnson). Topics for 2009 meeting (to be held at UCD) include: comparisons of scheduling software; building use policies; and self-service options.

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

STATUS: RSC has been preparing a proposal for a disaster response workshop. Draft proposal was presented to all ACGs for feedback and interest in participating. The proposal is being rewritten to include suggestions received from other groups and SOPAG. The workshop will be proposed to occur in spring 2009.

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

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

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: *VDX web statistics went live in March 2008.*

5. GOAL: CONDUCTS SPECIAL QUANTITATIVE STUDIES OF UC INTERCAMPUS MOVEMENT/TRANSMISSION OF MATERIALS.

5.1. OBJECTIVE: nothing defined at this time.

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