UC Resource Sharing Committee (RSC)

January 8, 2004

In person meeting, UCSD

MINUTES:

Present: Claire Bellanti (SRLF, UCLA, and Chair), Collette Ford (UCI), Gary Lawrence (UCOP), Gail Nichols (UCD and CAG liaison), Tammy Dearie (UCSD and SOPAG liaison), Eric Forte (UCSB and recorder), Donald Barclay (UCM), Charlotte Rubens (UCB), David Rios (UCR), Kerry Scott (UCSC for Deb Turner), Carol Hughes (UCI, visitor), Christopher McConnell (UCSF)

Absent: Scott Miller (NRLF)

1. Introduction and Announcements

Welcome to Ford and McConnell, new members of RSC from UCI and UCSF respectively.

2. Draft Report to SOPAG on the Consortial Borrowing System, VDX

Discussed points to make to SOPAG regarding implementation status. Hughes suggested that we add a few more details about complexity of issues and problems with the software and its implementation. Among the issues raised are:

OCLC fees will not go away, or even necessarily show an immediate, large drop

ongoing problems with VDX's communication with OCLC. We're still waiting for latest version of the software which promises to address this

duplicate requests

Patron viewing of own requests hasn't been tested or set up

Statistics need support from CDL, and we have as yet had no training or direction in Crystal Reports

billing for ILL needs to be worked out, again presumably with Crystal Reports

Staff at all campuses are ready and preparing to switch to VDX, and are looking at fixes for those aspects of VDX that are still lacking. In some instances, however, parallel systems will remain a necessity. RSC discussed the need to define "full implementation", i.e. we believe it is everything in the contract. Lawrence suggests working with CDL to help make VDX work with campus systems like local library databases and billing systems.

On the whole, VDX is somewhat similar to the process of implementing new MELVYL, but without much of the support from CDL. Who's in charge of VDX? (N.B.: the PIR Team.)

Actions:

Bellanti and Rubens will work with Mary Heath on details of where we're at with the software and other issues. This info will be incorporated into the draft report to SOPAG, and distributed to the group for comment.

3. Report from Subcommittee on Advanced Forms of Digital Delivery

Rubens distributed an early draft report from the subcommittee. They're still working on the report, and hope to distribute the final by end of Jan. The charge has grown- it was focused on the dim archive, now

it also includes special collections, and things like oversized materials and microforms. The subcommittee is looking at different user needs- preservation, vs. person who just needs to use.

Actions:

Subcommittee will keep working. Dearie will clarify with SOPAG about how scope of charge. When report is ready, we need comments quickly by email, in order to get it to SOPAG in time to meet our deadline (February 14).

4. Review SOPAG's reply to RSC on Special Collections Dialog Report

Bellanti reported on the Special Collections Dialog to SOPAG in December at a Joint Meeting between SOPAG and all campus groups. The ULs have said special collections should be lent as much as possible, but specials collections folks and resource sharing folks don't necessarily agree on what is possible. In any case, the project to loan special collections is not a pilot, it's a service now.

Barclay commented on need for better shared collecting work among UCs- scenario of a title that isn't particularly special being placed in special collections at all campuses, and no one is willing to lend.

Rubens points out that our report was a 'snapshot in time' related to the pilot project. IAG has actually already begun to address the issues. Scott and Turner wrote an article on best practices for interlibrary lending of special collections based on some of the UC experiences.

Actions:

SOPAG outlines six "next steps:"

Guidelines and standards of loaning of special materials; Bellanti suggests a subcommittee of CDC, RSC, and HOSC to begin work. Nichols and Rubens to represent RSC. Bellanti will approach CDC and HOSC about subcommittee.

RSC and HOSC to work on each campus to streamline process; Dearie suggests that perhaps this new subcommittee, along with local IAG and RSC people, meet with the Head of Special Collections and appropriate AUL on each campus to talk through the issues.

RSC's subcommittee on Advanced Digital Delivery Mechanisms to consider special loaning, too; Rubens suggests we also look at the results of Stanford's 2-year pilot of this. Subcommittee working on report (see above), and we'll need to work with HOSC on this portion, too.

Enhancing Melvyl to list circulation copies first; for MELVYL to list circulating copies first, it would require recataloging materials into discreet collections that may or may not circulate. Dearie reports that this can be done, but is a lot of work. Lawrence reports that as it is, it'd be very difficult to alter ordering of records in Melvyl. Dearie and Lawrence will outline what's possible and what it would take. RSC might meet further with folks at CDL, to refine this request.

Followup action items related to VDX and OCLC; Rubens reports that (#7 modifying OCLC source codes) is done. #6- special departments possibly having their own OCLC or VDX address- does not have much support. It would almost require new, separate ILL operations. Subcommitte of CDC, HOSC, and RSC will address further. #11, editing OCLC records for special collections: Rubens will find out just what this means. #20, study VDX for potential improvements for special lending: the subcommittee will do so.

Provide further info on website; RSC not sure exactly what this refers to. Dearie mentions need for packaging guidelines, best practices, etc.; Rubens thinks it may just be trying to let special folks know lending is something we do. Subcommittee will look at it further.

5. VDX Configuration Issue:

VDX configured for 4-day turnaround time; that is, items must have action within four days or the request is sent on to another library. Rubens reports that UCB, for some items, needs more than four days to respond to certain requests. Scott recommends it go to IAG to discuss issues and potential

ramifications of letting each campus specify own turnaround time. Dearie mentions that some units, on occasion, may let a request "time out" rather than respond negatively, but longer turnaround time hurts patrons. Is there a problem with the way VDX begins counting the four days? Hughes suggests giving whoever is last in the VDX rota a few extra days. Also suggested is UCB always going last. Want to make sure it's fair.

Actions:

Clarify data on when the four days starts counting. Refer the question to IAG, and ask them to provide a summary chart of turnaround time (VDX vs. non-VDX, too). Also get anecdotal info from IAG on nights, weekends, and holidays with VDX. Then, ask them for a recommendation for RSC to consider.

6. Review Information Literacy Report, the Google Generation, from CIG

Hughes gave background about report.

Actions:

Nothing in report directly appears to impact RSC; Bellanti will reply with positive notes to SOPAG.

7. Other items on concern from SOPAG meeting of December 12.

Bellanti and Dearie noted that SOPAG discussed web pages of All Campus Groups and Common-Interest Groups. CAG needs to bring their webpage into line with SOPAG's page. Also, a SOPAG member asked us what percent of patrons requested print rather than default web delivery. We need to find that answer. There was discussion of dim archive and government documents shared collection, etc., which all will eventually impact RSC heavily.

8. Report from CDL and UCOP:

Lawrence reports unresolved issue of request blocks when electronic is available. RSC recommended removing block, but we need to communicate this to Mary Heath (and cc John Tanno from SOPAG).

Elsevier deal done. Not sure if there are any changes to ILL provisions.

ULs meeting saw continued discussion of shared collections plans, dim archive, etc. progressing

Still working on building a dark archive with JSTOR titles, and maybe a dim archive, too.

Strategic plan for UC Libraries is progressing.

Digital preservation program starting.

9. Report from CAG liaison:

Nichols reports. Have an external user survey to share; still thinking about best practices workshop (perhaps relating to systemwide shared services for things like e-reserves). CAG is also looking at resource sharing code (sharing info, making policy about delinquent patrons). Need CAG folks to better respond and participate in CAG planning and activities.

10. Report from IAG Liasion:

Rubens reported that IAG has not met since the last RSC meeting, but it has been responding to issues when asked.