

Resource Sharing Committee

Conference Call, March 16, 2001

Present: UCR--Venita Jorgensen (Chair), UCB--Charlotte Rubens (for Patricia Iannuzzi), UCD--Gail Nichols, UCI--Pamela La Zarr, UCLA--Elaine Adams, UCSB--Marlayna Gates, UCSC--Deborah Turner (minutes), UCSD--Tammy Dearie, UCSF--Jacqueline Wilson, NRLF--Scott Miller, SRLF--Claire Bellanti, UCOP Representative--Gary S. Lawrence

1. Status of Pilot Project to Unblock Request for Special Collections Materials:

The Special Collection/ILL pilot project

HOSC is reviewing the final parameters (procedures and processes) of the pilot. They may explore standardizing these UC-wide. A list of Special Collection (Spec Coll) locations that will be eligible for borrowing is being finalized. This information will be ready by today. Tammy will forward the final copy to RSC for review. RSC-IAG is willing to share guidelines its formed regarding this pilot. RLF procedures are also under review. NRLF plans to forward the requested items to the home campus Spec Coll unit for review, statistics gathering, packaging, and shipping. This may be affected by HOSC guidelines as to what will be lent (i.e. archives, manuscripts, etc.).

RSC-IAG reviewing procedures with HOSC members. At IAG's suggestion, requests for Spec Coll requests go to a review file in the borrowing unit because the CDL Request programming for this procedure must be the same for all campuses. If both a circulating and a non-circulating Spec Collection copy exist, the system will ignore the Spec Coll copy and select the circulating copy.

A way has been found to segregate all Spec Coll items and to send them to the review file. Spec Coll libraries will not be listed in the lender string. Rubens discussed an option for Lending staff to review requests in an effort to review and screen out requests for items that may be available from a non-Spec Coll location.

Turner reported limited transportation issues between UCSC and NRLF.

RSC discussed discrepancies within the ILL needs statement and draft of HOSC procedures, especially in regards to recording funding information. Concern was expressed about these discrepancies, but all realized this may need to be resolved at the local or SOPAG level. As Tricor costs are covered by central UCOP funding, RSC may encourage HOSC to see if the same funding source could be used for interlibrary lending of Spec Coll materials.

Dearie agreed to collect forms and statistics for material being requested and filled loans during the pilot period. She will also periodically report this to HOSC. Dearie will also send a final copy on HOSC/ILL procedures and processes to SOPAG when they become available.

RSC agreed that there would be no major publicity of this pilot. The pilot is slated to begin 4/1/01, not a fixed start date. Dearie welcomes comments about the pilot. The committee thanked Tammy for her work on this challenging project.

2. Desk Top Delivery Report: SOPAG expressed concern regarding the latest timeline for the installation of Consortial Borrowing Software (CBS) and asked if there was a way to implement Desktop Delivery before the CBS implementation. Several issues were discussed, including:

- how to determine user needs regarding the desktop delivery of CDL Requests.
- would require lending staff members to talk with patrons from other UCs.
- each campus would need to create a server to store electronic documents requested
- each campus would require a certain level technical expertise if Relay was not used. The Desk Top Delivery task force has been recalled to explore options. It reported the following:

option 1. Use Resource Sharing funds to purchase Relay Express software and a scanner for each unit

option 2. Delay a decision about Desktop Delivery Software until the CBS planning is complete.

option 3. Use Resource Sharing funding to purchase scanners for each unit to use with existing operations until system wide software (CBS) can be implemented.

The Task Force led a discussion about the feasibility of updating all UCs to Ariel 3 and/or of determining methods locally for implementing an interim desktop delivery service.

All noted that SOPAG's request could mean implementing unmediated ILL requests.

RSC asked the Task Force to incorporate this following into a response to SOPAG:

1- A justification for an funding scanning equipment this FY in order to allow time to implement local pilots, train staff, and advance a UC-wide service

2- That each UC will implement a pilot program that will allow each campus to respond to local demands and gain experience. It was understood that the full UC wide implementation will not necessary support software chosen for local campus ones.

3. CAG Projects: a. Best Practices Workshop

CAG developed a workshop proposal before SOPAG established best practices workshop guidelines. Therefore, it plans to be review its proposal with an eye to incorporate the recently introduced guidelines. RSC commented that the workshop focus should include a discussion on definitions of what best practices could be established. It might also focus on the changing roles of circulation, especially with regards to CDL Request. RSC discussed the need to begin to integrate CAG into the broader discussions on UC resource sharing; to the same end, the committee considered whether or not ILL staff members should also be invited to attend the workshop. RSC recommended that organizing two regional (one north, one south) meetings might let more staff attend.

b. Blocking UC Individuals at Home Campuses RSC discussed when to interrupt borrowing privileges for UC to UC ILL transactions involving damages to materials and/or delinquent behavior. [This item stems from a specific problem which originated at UCR and affected UCSD.] UCSF reported that it currently notifies patrons in advance that there can be ramifications for damaging items at another campus. ACTION: RSC will send this issue back to CAG for further consideration. Claire coordinate with CAG to find out what current practices are at each campus and to and explore UC-wide language to which all can agree.

4. Library of California ILL Reimbursement Project - Additional Requirements: RSC discussed asking all non-UC libraries to become members of Library of California (LoC) and to make their membership status know when requesting UC materials via ILL. Most campuses plan to send a note saying copies/requests sent are for UC faculty. This will provide a paper trail needed for internal UC uses. It was noted that UCSF intends to become a LoC member. ACTION: RSC will ask that all libraries requesting materials from UC Libraries indicate LoC membership status in the borrowing note in each of their requests. If such a note is not there, requests will be refused. Each campus agreed to inform their respective regions about this change

It was noted that it would be useful to have a list of CSU's and CA public libraries that are not LoC members. But, a definitive list will not be available until after April.

5. Status of RSC Copyright Workshop? SOPAG has expressed concern that the general approach to the current draft of the Copyright workshop. They asked the planning committee to study further the parameters of the workshop. Therefore, the planning work group will survey RSC, HOPS and other representatives to identify who the library copyright leaders are for each campus. The group will begin to identify what specific issues should be addressed. Then, they will be in contact with national leaders to help reshape the workshop. The Planning Committee deadline 4/4/01 to receive information. We may need to postpone the workshop date from end of July 01 to the beginning of 2002. RSC expressed support for the committee's approach to restructuring the workshop.

6. Next Meeting: Jorgensen will email all about next potential meeting dates.

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