

UC Resource Sharing Committee (RSC)

April 17, 2003

Conference Call

Minutes Present:

Charlotte Rubens (UCB), Lucia MacLean (UCD for Gail Nichols), John Bareford (UCI), Elaine Adams (UCLA), Donald Barclay, Recorder (UCM), David Rios (UCR), Tammy Dearie, Chair (UCSD), Kier Reavie, (UCSF), Eric Forte (UCSB), Deborah Turner (UCSC), Kerry Scott, (LAUC), Gary Lawrence (UCOP), Mary Heath (CDL), Scott Miller (NRLF), Claire Bellanti (SRLF)

1. Announcements:

Dearie welcomed Eric Forte, the new UCSB representative.

2. Updates

RSC-CAG/IAG RLF Recommendations

Dearie presented the RSC-CAG/IAG recommendation for changes to the code regarding the use of RLF materials on reserves to SOPAG. Small changes requested by SOPAG.

Old wording: "Material loaned for course reserves is not recallable."

New wording: "Material loaned for course reserves is not normally recallable."

SOPAG had a question about length of the loan.

Old wording: "RLFs need to be informed that the request is a reserve item to insure that the loan period will be institutional length (1 year)."

New wording: "RLFs need to be informed that the request is a reserve item to insure that the loan period will be institutional length (1 year)." Tammy Dearie will add another sentence.

Special Collections Pilot:

Dearie presented the final version of the Special Collections Pilot Report to SOPAG. SOPAG had a few recommendations regarding specific wording.

A general discussion was held about various UC special-collections ILL and the willingness to lend. RSC understands that not all collections may be available for lending, but still concerned about the evenness with how this is carried out at various campuses.

RSC agreed with the recommended changes. Dearie will make the changes and post the final version on the RSC website.

Turner provided an update on the effort to gather qualitative and anecdotal information about the ILL/Special Collections pilot project. She has received notes from five campuses that held joint meetings with Special Collections and ILL staff members. Turner will forward a report of the information submitted to RSC as soon as it is ready for review.

Lucia MacLean: Gail Nichols feels that best practices model does not fit special collections and all need local review.

RSC Code Charge

Dearie presented the draft charge to SOPAG who had questions about the timing of creating a new policy now, during implementation of VDX. SOPAG concerned about workload.

There was some concern that waiting would cause us to lose momentum, but also acknowledgement that policies will continue to change as VDX is installed.

Lawrence suggested a compromise to the timeline by a process to start framing issues while VDX is happening.

Dearie: SOPAG would like RSC to frame a list of issues facing ILL. Dearie, Lucia MacLean, Kerry Scott, Claire Bellanti and Gail Nichols will get together to frame list for review.

Lawrence reported to the Collection Management Planning Group (CMPG) that RSC is addressing Resource Sharing Code. CMPG enthusiastic about it.

Tricor

Dearie: Close to having a contract. Tricor has created a list of over weight charges plus a 5% increase in the overall contract. Dearie will incorporate changes suggested and send out list of charges for review. Campuses will still pay for ties, bins, and pouches. UCD Law Library wants to participate, but their records need to be accessible in Melvyl. Heath reported that if UCD Law is willing to accept email requests, we could add UCD Law. Dearie suggested that we include the UCD Law in June-July when they are accessible in Request. UCB is the only law library currently not participating. Rubens reported that UCB ILL does interlibrary loans and borrows for UCB Law Library. She will contact them about desire to participate.

VDX

Mary Heath and Claire Bellanti led discussion.

Mary Heath reported that SOPAG has concerns about why VDX is taking so long to implement. One of their concerns is that we are trying to create a perfect system. Mary, working with the Request Team, created a status report for SOPAG.

Concerns from the RSC perspective included slowness that is partly related to what and how fast Fretwell-Downing can respond. For instance, they fix one issue, but five or six issues may be discovered once we get past that one. Heath

reported that it does take F-D time to come up with workable solutions since our system is using the most complex configuration features (OCLC profiles, and the Melvyl and Request interface). F-D has been faster last few months.

Bellanti reported that there is still a fair amount a skepticism among ILL staff about whether VDX works or not. A demo at the UC Southern ILL meeting of the Web client showed that a lot of what is needed to launch is there. Still concern that major parts are missing. The list of things that need to be worked on is getting smaller and there are fewer surprises than before, but some still there. Outstanding issue: Windows client is so slow it is impossible to use, and the web client is not yet fully functional. Next release of VDX (middle of August) may solve some of the problems. Hopefully, by middle of summer we can start using VDX to process Melvyl Requests. After spring quarter rush ends, UCLA and UCSB will start staff training, etc. We must define what F-D can do in Windows and the Web and quantify the effort that will go into Windows client. Bellanti will go through RFP and see if she can correlate what is called for in RFP with what ILL staff wants.

Heath reported that the RFP required that VDX could send requests to OCLC. It can do that, but UC's use of OCLC is so complex that F-D had to do programming to accommodate it. Heath also mentioned that it may be difficult for front-line staff to decide what is absolutely necessary and what they can live without given the increased demands for Request services and static staffing.

Heath is working on a document to send to SOPAG and is uncertain how to proceed. Outstanding issues include blank forms and book bands. RSC needs to review functionality that will not be available on proposed Day 1. Decide what we can or cannot go ahead without.

Bellanti had concerns that report to SOPAG is too positive. Glitches may still be out there. SOPAG expects us to make huge savings in OCLC right away, and it won't happen. Do we need to make more qualifications to report?

Heath asked if we can identify what is missing from the list and determine what is required to launch and what we can wait six months to have. Heath will then take that to SOPAG to give them a better sense of the issues.

Additional clarification:

Elaine Adams: What ILL staff mean by critical is everything necessary to make requests really go through and everything that ensures incoming requests have complete information. Training from F-D was not good. ILL staff is frustrated.

Gary Lawrence: Pilot has revealed complexity of ILL processes and brought up questions about vendor's ability to implement. We should reverify the assumption that once we are "clean" at UCLA and UCSB, we will be capable of implementing at the remaining campuses without significant problems, as well as to consider when and how to begin

implementation. Is it preferable to use slow summer season to implement, or is it acceptable to roll out (perhaps more slowly) during the academic term? Should we wait until 2.3 comes out? Even if that implies deferring full implementation until summer 2004?

Mary Heath: Those are important questions. Key question: Should we move quickly or have a slow rollout?

Gary Lawrence: While there may be a perception that ILL staff are trying to create the perfect system, RSC feels they are just trying to get the damn thing to work. Major benefit to the University is not in having every function working, but in having all campuses using it.

Action items: Claire Bellanti will review list of VDX functionality items and add new ones based on RSC member recommendations. Forward them to SOPAG. Deadline of Tuesday afternoon.

NLM Proposal

Dearie reported that NLM asked their user base if it was critical for NLM to implement ISO or could it wait? UC response is that ISO is critical and can't wait, as it will affect main ILL as well as medical libraries. UCLA could save 5-6K per year in Biomedical library if VDX could talk to Docline.

Action: The Request Team is drafting a response to the NLM proposal.

Resource Sharing Budget

Lawrence reported that the Resource Sharing budget has been \$1.74M since 2001-2. As part of targeted cuts for 2003-2004 the budget will be reduced by \$1M. ULs are discussing this as well and trying to decide how to reconcile shortfall while continuing to support ongoing commitments. ULs may determine that some ongoing costs may need to be picked up by campuses.

3. Discussions

Reexamination of 1991 UC Policy on Access for External Users

Bellantini raised the issue of library card cost for Alumni association members. Many people join the Alumni Association just to get the less expensive card. The cost (varies among campuses, but typically \$30-\$60 per person) is very inexpensive for the services they receive and less than the standard UC cost for a library card (\$100). Several campuses reported that they push their Friends service (money comes to the library). Others reported that for-profit businesses join Friends of Library as individuals just to get cards.

Lawrence provided background on the original policy and 1991 revision, which were done at request of the state. The state wanted higher fees and consistent fees across campuses. Money for UC cards goes to state, not to libraries or campuses. The 1991 revision extended complimentary cards to public school certificated staff. An attempt was made at the time of the 1991 revision to modify the complementary privilege for alumni, but the President expressed concerns over any change in policy that would adversely affect the Alumni Associations (a strong lobbying group?).

Lawrence suggested that the political and budget climate create a difficult time to bring up this issue. He suggested that each campus library is free to make better arrangements with its AA and to decide what privileges are given with various cards. If there is willingness to press this issue, it would be best if ULs acted as a group (since each campus is obliged to extend alumni privileges to AA members from other campuses, and therefore faces limits to unilateral action). Lawrence also recommended that each UL would need to secure the support of his or her campus alumni director before moving the issue to the University wide level. It would not be exceptionally difficult to update the charges for public fee cards provided in the current policy, at least to account for inflation, but the libraries should give thought to their reasons for doing this, as the additional money is returned to the state.

Action: Campuses to take up with their UL if warranted.

IAG recommendation to eliminate Melvyl limits

Scott forwarded a recommendation from IAG to remove the 20 Melvyl/20 A&I limits in Melvyl Request. RCS unanimously agreed to the recommendation.

Dearie will take the recommendation to SOPAG for review and approval.

4. Round Robins

ARL Cost Study

Bellanti asked the participating campuses if they found the study useful. Those who participated expressed negative reactions to the format of the study. There was confusion about whether or not to count Requests. Without Requests be counted as “unmediated” activity, the study was useless in comparing our true cost. Bellanti suggested it would be useful to draft a collective response about study and send to Mary Jackson.

Action: Dearie: will draft a response for RSC to review.

Ariel/Infotrieve

Dearie reported that ARIEL, software, created by RLG, has been sold to Infotrieve. As a large user base of the software, are there issues to take to new owners that could facilitate the use of ARIEL for VDX? Lawrence noted that LTAG is identifying technical issues and considering opening dialog with Infotrieve about them. Heath/Lawrence will forward LTAG list to RSC for discussion.

Action: Dearie will review the timeline and determine whether or not RSC should have input. Relationship between Melvyl, VDX, and Ariel is critical.

5. Other

Nominations for New Chair

Dearie's chairship ends June 30, 2003. Per the RSC charge the Chair is selected by the membership for a two-year term. RSC members should send nominations to Tammy Dearie by May 15 and she will send out ballot to RSC membership. The ballots will be due May 30 and the new chair announced in June.

Next meeting: to be scheduled by new chair.