

Conference Call, Friday August 2, 2002

Minutes

Present: Tammy Dearie (UCSD & Chair); Pam La Zarr (UCI & recorder); David Rios (UCR); Jutta Wiemhoff (for Scott Miller, NRLF); Deborah Turner (UCSC); Gail Nichols (UCD); Gary Johnson (UCSB); Elaine Adams (UCLA); Jackie Wilson (UCSF); Patty Iannuzzi (UCB); Lucia Snowhill (LAUC); Claire Bellanti (SRLF); Gary Lawrence (UCOP); Mary Heath (CDL).

Absent: Bruce Miller (UC Merced)

1. Introductions by all. There were no additions to the agenda.

2. Announcements

Marlayna Christensen has joined UC San Diego as the Head of Access Services at the Social Sciences and Humanities Library.

UCSC has a new Library homepage; all existing links should point to it.

UCLA has had downtime with OCLC caused by human error during a review of dead accounts.

UCD's OPAC has been down the past week, but is expected up by the weekend.

2.1. Call for RSC-CAG liaison

C. Bellanti has been representing SRLF, the PIR team, IAG, & CAG. A new liaison is needed for CAG, the Circulation Advisory Group.

Action: G. Nichols volunteered for this appointment. T. Dearie will take the recommendation to SOPAG for approval.

## 2.2. ARL ILL Study - UC participation

SOPAG has requested a round robin on plans for participation in the ARL Study:

Berkeley - Yes

Davis - Yes, but unsure about all units

Irvine - No

Los Angeles - Yes, but unsure about all units

Riverside - No

San Diego - Yes, but Main only

San Francisco - ineligible and not pursuing

Santa Barbara - Yes

Santa Cruz - ineligible but pursuing

### 3. Special Collections project status report

T. Dearie asked if all were able to open the large report files. The goal is to get volunteers to draft a report and recommendations to share with HOPS and other groups.

#### 3.1. OCLC data

#### 3.2. Sample collection period data

#### 3.3. Special Collections survey (D. Turner)

(ILL/Spec Coll Survey draft 7/02)

There is a large amount of OCLC data. UC loaned quite a few Special Collections requests. The next efforts will include dividing loans and copies for the sample collection period, April 29, 2002 - May 10, 2002.

D. Turner proposed looking at a special survey. We have gathered quantitative information, but now need to try for qualitative information for more process improvement. Special Collections staff should also work with us to gather this qualitative data to help figure out the next steps to take. D. Turner will involve both Special Collections and ILL staff at UCSC.

UCB is has returned to traditional process of incoming Special Collections requests (ILL staff reviewing, verifying, and only sending requests that fit criteria for loan). UCB received many negative comments from the Bancroft staff about the pilot. Copies were given a good response time, but most loans were denied and those approved had transit problems. Many loans approved were not returned on time.

Other UC's are still trying to procure Special Collections loans, but not keeping the survey forms. C. Bellanti volunteered to help T. Dearie with the summary report to be sent to SOPAG for review. Lynda Claassen, Head of UCSD Mandeville Special Collections Library, will be asked to help with the raw data and give Special Collections input. A draft of the report will be circulated to RSC, RSC-IAG and HOSC for review and comment.

ACTION: Draft reports for both the sample collection period and the qualitative data report will be finalized in early September.

#### 4. CAG Issues

##### 4.1. Workshop

CAG originally proposed a more general workshop for its membership. Current recommendations now propose the catalyst for first workshop is Electronic Reserves with the second workshop focusing on best practices. Some CAG members do not have Reserves responsibility, but G. Nichols reminded that Reserves is part of the charge and responsibility of CAG. UCLA, UCSD, UCD, UCB, and UCSC shared information about campus and library thoughts and plans regarding e-reserves and faculty web services.

##### 4.2. Blocking proposal - SOPAG response; next steps

T. Dearie revised the Blocking proposal with comments from SOPAG. Andy Panado, UCSF and Chair, and the other Sub-Team members were commended for their fine efforts. SOPAG is in agreement with Blocking, but will revisit the proposal with the local campuses after re-wording.

Action: SOPAG will send the document back to CAG asking for guidelines and procedures instead of policy. The terminology will be edited and the proposal will again be reviewed.

#### 5. IAG Issues

IAG is currently working on revising the UC Interlibrary Loan Code. RSC will look at the revised charge and take to SOPAG. IAG is creating a new Web page with links to the IAG Charge, UC ILL Manual, and IAG meeting minutes.

## 6. CDL

### 6.1. VDX Implementation Discussion

M. Heath reported we are about to bring up systemwide production but there are issues with campus workflow because of very, very slow displays. There has been one successful borrowing test at UCLA. UCSB may also want to test lending at the end of August. E. Adams reported frustration with the Web because they can only make new requests but not complete other actions. B. Freel has compiled a list with 6 major issues to be sent to M. Heath. None involves the Web client. NRLF is both requesting and updating. M. Heath will look at the UCLA account to determine if it is set properly. E. Adams cited a major issue of VDX working with OCLC's IFM. At present VDX doesn't allow IFM numeric characters, an essential for both ILL borrowing and lending. All are urged to subscribe to both the national and UC VDX listservs.

### 6.2. elinks

There are some continuing problems and some concerns with WorldCat requests going to ILL review files. T. Dearie reported elinks is being heavily used, with UCLA the heaviest user. It is up to each unit to set profiles correctly for custom holdings.

### 6.3. Desktop delivery

As of a month ago, IAG did a survey and listed DTD participants:

Berkeley - Yes

Davis - No

Irvine - Yes

Los Angeles - Yes

Riverside - Yes

San Diego - No

San Francisco - No

Santa Barbara - Yes

Santa Cruz - Yes

SRLF - Yes

NRLF - Yes

#### 6.4 Non-UC contributors - status report

There are two categories: Getty and Stanford have no UC relationship; the labs and the law schools consider themselves UC. ILL services are an important reason for their records to be in Melvyl but there

is concern that they meet the standards. There is interest among the non-UC contributors in participating in VDX and Tricor. Discussion continued distinguishing what might be considered our legacy agreements with non-UC contributors and present ILL and license agreements.

Action: T. Dearie will contact the law libraries and begin conversations to bring the issues to SOPAG. T. Dearie will suggest the law libraries set up their own Tricor contract. The law libraries cannot be added to our present contract this year because CDL pays the Tricor fees annually.

#### 6.5 Request limits - time to increase?

T. Dearie reported 20-30 people are regularly trying to exceed the present limit. With VDX and access to Request via the remote databases, the number of individuals using Request may increase so it may be advisable to wait until January.

Action: We will wait until VDX is fully implemented to revisit the issue of raising the Request limits.

#### 6.6 Unblocking requests for video materials

T. Dearie noted many UC video collections are not part of the libraries and do not circulate. Discussion included perhaps unblocking video materials for those that do lend and let the Request system take care of the ILL requests. Concern was expressed that this might raise false expectations among our users. Consideration was given to a proposal to treat video material much as Special Collections requests are now treated.

Action: T. Dearie will write up a summary and send to IAG for review.

#### 7. Web presence (<http://sshl.ucsd.edu/ucrsc/index.html>)

All campus groups are being asked for improved Web presence to better communicate with SOPAG. IAG is working on a new Web page. Suggestions to include on the Web include information on how to subscribe the VDX listserv and who to contact for VDX information.

#### 8. Goals and objectives for 2002/2003

The previous goals/objectives on the Web page under "Reports" show we are doing what we said we would do.

Action: Volunteers to draft the 2002/2003 goals and objectives are E. Adams, T. Dearie, and D. Turner. T. Dearie will send the draft before the October meeting.

9. Proposed meeting schedule for 2002/2003:

Monday, October 7, 2002, 10-3 in-person meeting in Oakland

Thursday, January 16, 2003, 10-12 conference call

Thursday, April 17, 2003, 10-12 conference call