

Resource Sharing Committee (RSC) Minutes

October 20, 2005

UCOP

Present: G. Nichols (Chair), C. Ford, J. Lee, E. Scott (recorder), A. Harlow, G. Johnson, K. Scott, M. Christensen, K. Reavie, S. Miller, C. Carlton, G. Lawrence, M. Heath (recorder), L. Mix

1. Minutes

Minutes of the previous meeting were approved with a correction to the spelling of Keir Reavie's name.

2. Report on the SOPAG all campus groups meeting

Gail Nichols reported on the following issues from the October 14th meeting:

There was no further report from CDC on the Special Collections ILL Project, but SOPAG accepted the HOSC/RSC report dated 7/28/05. It includes some changes to the UC ILL procedures that IAG will need to implement. HOSC also has some implementation items from the report. RSC Action: IAG will modify systemwide ILL procedures to implement the recommendations on handling special collections materials through ILL. Gail Nichols will send IAG the specific items to be implemented (i.e. UC ILL Code revision and UC ILL forms revision).

There was a left over action item from the RSC/HOPS joint meeting. "Form a standing work group (2+2) to help CDL resolve Request and E-Links issues that cross RSC and HOPS charges." RSC Action: Gail Nichols will follow-up on with the chair of HOPS.

HOTS noted that eDissertations continue to be discussed. It seems that many groups are talking about it, but no one group is the right one to address the issue. SOPAG will add this to their November agenda.

The Library Privacy Liaisons had a long discussion about its role and charge. There are continuing privacy issues with digital reference, access to sensitive health information, circulation records, etc. The group noted that privacy issues become more relevant when they are tied to real projects, so their main goal would be to liaise with other ACGs and the projects they're working on. SOPAG agreed that the LPL should continue as an ACG.

LTAG investigated web conferencing software applications and recommended a commercial product – Team to Team. To lessen the cost, several campuses volunteered to host a user. Merced will host a user for HOPS, HOTS, and LPL. UCLA will host a user for LTAG; UCSB will host a user for SOPAG and CDC. A funding source still needs to be identified.

RSC Action: RSC will need to identify a host campus, if it wants to use the application.

RSC's reports on the loaning of special collections materials and media was distributed to SOPAG members prior to this meeting. Nichols emphasized that the procedures are in place to loan these materials through ILL, and that the resistance comes from those responsible for the collections, not ILL staff. Increased loaning of these materials is really a collections issue. SOPAG will keep the media issue on the SOPAG agenda for future discussion. SOPAG seemed interested in pursuing media loaning, especially through licenses that permit the making of archival copies. There is a need to clarify what the real issues are. Documenting the flows of materials might be useful to the ULs. RSC Action: RSC should send a request to IAG and the VDX Team to explore how to capture media information for both filled and unfilled media and special collections requests.

SOPAG was very interested in the Copyright Clearance Center discount that IAG is pursuing. A recommendation will be forthcoming from RSC.

SOPAG had a contentious discussion of closing the hole in the requesting of reserves items through ILL. SOPAG stressed that we need to rethink the whole issue of denying ILL for reserves material. Some SOPAG members asked why an ILL request should be denied just because the item is on reserve at the requester's campus. RSC Action: RSC will need to discuss and decide whether to pursue.

3. RSC annual report

The report incorrectly states the status of UCI vis-à-vis VDX; UCI has been borrowing on VDX since May 2005. RSC Action: Gail Nichols will correct the Annual Report.

RSC may want to address the issue of ILL loan periods being inconsistent; if changes need to be made, there will need to be a policy decision from SOPAG or the ULs. The Shared Print policy on persistent deposits, which has been approved in theory, is that all campuses will have equal access; this does establish a uniform circulation policy for that material. RSC Action: RSC will ask IAG to review this issue by looking at data and determining if there is an interest in changing the policy.

Copyright Clearance Center Consortial Discount: Pam LaZarr will present a report at the IAG meeting in November on the process for obtaining a group to get this discount. RSC Action: RSC is expecting a recommendation from IAG to forward to SOPAG.

Direct ISO ILL messaging with the CSU campuses – 11% of UCSB lending is to CSU campuses, so direct messaging would be convenient, but it would require that we use other options for cost recovery than OCLC's IFM. If it were necessary to invoice for each transaction, that would need to be automatic. Another possibility is to consider a UC systemwide contract to provide a specific level of service, though no campus has an ILL contract with systemwide CSU currently. RSC Action: Mary Heath will perform a thorough test of the ISO ILL suite of responses with a CSU system (previous tests were rudimentary).

RSC Action: RSC will collect some data from IAG on the levels of use between January and May 2005, in preparation for developing a proposal for the ULs.

UCSD and UCR are currently using a volume purchase program with CCC for electronic reserves; CAG should be asked if this would be useful across all campuses, and instructional technology usage might also be considered. RSC Action: Marlayna Christensen will look at reserves, WebCT, and Blackboard.

RSC Action: RSC should suggest to SOPAG that it would be useful to have a separate copyright group similar to the Library Privacy Liaisons to accumulate a variety of expertise and build a shared knowledge. Gary Lawrence will draft a statement of support for such an initiative.

Regarding statistics reporting, Gary Lawrence is waiting for VDX to be fully implemented on all campuses to obtain uniform statistics for all campus' ILL activity. Obviously, some data, such as Docline activity, won't be included for a while, so there will be a need for to continue collecting from each campus. Gary is now beginning to focus on data for digital material, figuring out how and what to count; he is thinking of three categories of reporting: statistics that are published for public use, those collected for internal use only by the UC Libraries, and an optional category of "experimental" reports, similar in concept to the ARL Supplemental Statistics.

4. Web sites

The RSC, IAG, and CAG web sites are now at UCD and are being updated. In the future web site maintenance will move to the campus of the RSC chair.

5. IAG – Reserves ILL Blocking

Gail Nichols presented the IAG document, IAG Information to support the RSC Request to Block Student Requests for Reserves Material from CDL Request, dated 10/19/05. Several issues were identified and discussed related to this document and the proposal.

The document does not differentiate between blocking of faculty and graduate students versus undergraduate students.

Reserve collection philosophy varies substantially from campus to campus. Some collections are solely materials for course reserve, while others include other non-course reserve materials.

The data presented was not collected according to any uniform methodology and only included figures from four campuses (UCB, UCD, UCSC, UCSD).

The data were inconsistent and inconclusive and do not clearly demonstrate a significant systemwide problem nor do they illustrate the “severe workload problem” as described in the document.

Three campuses (UCLA, UCSF, UCM) do not consider this relevant to their campus and therefore withheld strong support or were entirely neutral.

Further discussion included related issues:

SOPAG reaction and apparent lack of support of the initiative.

Gary Lawrence reported that in a 2003 survey of the ULs to summarize campus reserve practices (in response to an inquiry by the Lieutenant Governor), campuses indicated that "in general, the libraries do not acquire required textbooks for the permanent collection, as these become outdated quickly and do not have lasting teaching or research value...."

Due to current CDL workloads and staffing levels, programming time is not justified by the evidence presented. RSC Action: Gail Nichols will report to IAG that this needs to be dealt with at the campus level, rather than systemwide level.

6. Tricor MOU

Gail Nichols reported that responsibility for coordinating the Tricor MOU with Cate Hutton (UCOP) has been passed to her (UCD) from Tammy Dearie (UCSD). The MOU allows either party to open renegotiation discussions.

Monthly overage charges were eliminated for one year, but they have reappeared on campus bills since the MOU has not been reopened. Gas surcharges have increased, but this does not affect campus Tricor costs. RSC Conclusion/Action: RSC decided not to ask systemwide to reopen discussions on the MOU.

Gary Lawrence reported that other potential UC-Tricolor relationships have been considered.

7. CAG

Last CAG Circheads meeting at UCSC was very productive and demonstrated a continuing trend toward very effective use of time and the opportunity to share information and best practices among staff colleagues systemwide.

RSC Action: Next CAG Circheads meeting will be at UCSB in March, 2006.

8. IAG

Annual meeting scheduled for November 3, 2005, at UC Merced. Agenda includes: CCC group discount; VDX records retention and the separation of the data link between the patron and item; Ariel 4.1; VDX implementation; OCLC compensation; VDX 3.0; lending/borrowing update.

9. CDL Report (Mary Heath/Gary Lawrence)

VDX Implementation: Mary Heath will begin to delegate some VDX activities currently within CDL out to the campuses.

PIR: Very little new beyond tweaking for each new database subscribed by CDL.

New machine for VDX coming in early December; should be somewhat faster than current box.

VDX Team: This group has demonstrated continued value; maintains expertise at individual campuses. Gary Johnson's (UCSB) 50% CDL position ends December, 2005. This will necessitate increased involvement by team members. RSC Action: Request SOPAG approve a 1 year continuance for the VDX Implementation Team; open group to more members to more effectively tap existing talent.

RSC Action: Mary Heath will draft new charge and circulate to RSC for comment.

Systemwide resource sharing budget process taking longer this year. Program support remains at current level for VDX, Tricor, Shared Print collections. Following previous practices, the Resource Sharing and SCAP Database budgets are considered together in the budget analysis.

10. Next RSC Meeting

Conference call on 1/26/2006.