

## **Resource Sharing Committee (RSC) Minutes**

Conference Call

July 13, 2006

**Present:** Eric Forte (UCSB, Chair), Charlotte Rubens (UCB), Linda Kennedy (UCD), Pamela La Zarr (UCI, for Collette Ford), Janet Moores (UCR, for Ann Frenkel), Sarah Troy (UCSC), Don Sloane (UCLA), Scott Miller (NRLF), Colleen Carlton (SRLF), Sherry Willhite (CDL), Eric Scott (UCM), Keir Reavie (UCSF), Lisa Mix (LAUC)

**Absent:** Marlayna Christensen (UCSD)

### **1. Introductions and New Members**

The group welcomed new members Linda Kennedy, Sarah Troy and Sherry Willhite.

### **2. Approval of 4/20/06 Minutes**

Minutes were approved.

### **3. Annual Report/Goals and Objectives for 06/07**

The group discussed the 05/06 RSC goals and objectives to decide which will continue this year, which are complete, and to add new objectives. Forte will revise the goals and objectives for 06/07. Sloane and Scott will help with editing. RSC members are also encouraged to send Forte any new objectives, beyond those discussed here, that they feel are appropriate for the next fiscal year.

Refer to <http://libraries.universityofcalifornia.edu/rsc/goals.html> for the 05/06 for the goals and objectives.

#### Goal 1

- a) This objective will continue. The next milestone in VDX implementation will be the roll out of ZPortal.
- b) This objective will continue.
- c) The CDL would like the VDX Task Force to continue until all campuses are fully functional with VDX. Forte will discuss this with SOPAG, since they will make the final decision on the continuation of this group.
- d) Some campuses are still reluctant to extend their interlibrary lending period. The group felt that this should remain as an objective, but to wait until VDX is fully implemented and then review this issue.
- e) This objective is no longer applicable.
- f) This objective has been completed. All campuses but Berkeley have joined the volume purchase program.

New objectives for Goal 1:

- a) The group felt that it would be important to draft an objective that makes reference to the Bibliographic Services Task Force Report and its implication for the future development of resource sharing systems in UC.

Goal 2

- a) This objective will continue.
- b) This objective will continue.
- c) This objective will continue

Goal 3

- a) These policies need to be reassessed on a regular basis, so this objective will continue.
- b) This objective will continue. The group felt that it was important to develop this code and thought a good first step would be to define what this code should contain. Forte is going to check and see if a subcommittee was ever appointed to develop this code.
- c) This objective will continue.

Goal 4

- a) We were not sure that this was completed. Forte will check with Gary Lawrence on the status of this objective.

#### **4. Request Facelift**

Willhite reviewed the request facelift. The main changes are as follows:

Revisions

- Users will identify their campus and then see only those options available for that campus, such as pin numbers and delivery locations.
- There will no longer be a choice for web or paper delivery. Web delivery is the default. All documents should be delivered this way when possible.

Handling of missing items

- Users will be directed to information on campus document delivery services when the document they are requesting is available on their home campus. For items that Request believes to be held locally, users will not only receive an option to use DDS, but also an option to continue processing the request anyway in cases where the volume may be missing or otherwise unavailable, unbeknownst to Request. Each campus will have the option to allow their users to bypass DDS and still order these items through interlibrary borrowing, so they can order items from missing journal issues (see below). Each campus should let Sherry know if they want this bypass feature enabled for their users.

CDL plans to have these new features in place by mid-August, so they can be tested and made ready for the fall term.

Sherry will notify the campuses when the document delivery service features are available, so campuses can opt in or out of the DDS bypass feature, to enable patrons to order missing items. It was also suggested that IAG monitor the use of this feature, to see if patrons abuse by trying to borrow articles available within the home campus collection.

## **5. New ILL Code language**

The new language was approved. Forte will let IAG know that they can go ahead with this document.

## **6. VDX Records Retention Policy**

Rubens reviewed the VDX records retention policy developed by IAG. RSC wanted to know whether the CDL as well as the campuses will be archiving this data. Willhite will check with Mary Heath regarding the archiving plan.

Forte will inform IAG that this plan has been accepted, and it will be added to the CDL cue for implementation.

## **7. Direct Lending with Stanford and CSUs**

Peer to peer lending and borrowing with Stanford using VDX has been tested. There is a small problem on the VDX end of peer to peer, but this should be resolved shortly. Campuses can then start implementing peer to peer with Stanford.

CSU would like to start peer to peer lending and borrowing with UC. CDL can run a test, but there are still a number of issues that need to be resolved before doing a test. These include:

- Campuses would no longer be able to use IFM for billing.
- CSU has very short loan periods.
- CSU would like a reciprocal agreement, but many UC campuses are by far net lenders to the CSUs.
- Would we have Tricor delivery with CSU campuses?

Peer to peer with the CSUs will be sent back to IAG, so they can work on operational issues. A task group consisting of Forte, Rubens and Troy will review the higher level issues like reciprocal agreements in more detail.

## **8. CAG Report**

Scott reported that there was nothing new to report from CAG since the last RSC meeting.

## **9. IAG Report**

Rubens reported on the following:

- Testing and implementation of ZPortal.
- Updating the ILL code.
- Completing modifications on special collections lending procedures.

#### **10. CDL/VDX Report**

Willhite reported on the following:

- ZPortal should be ready for wider testing by August 1. Willhite will send RSC members logins, so they can try it.
- CDL will be upgrading VDX staging in the near future.