Future of UC Resource Sharing Project Team Charge

August 28, 2015

At ALA 2015, OCLC made clear that they will stop support for VDX and has a migration plan for moving to Worldshare ILL that extends for approximately 30 months. It is not clear, though that UC's VDX product replacement needs will be satisfied by WorldShare ILL. Given UC's complex ILL and document delivery services and needs, a suitable replacement set of services should be identified and implemented. This project team has the responsibility to think strategically about the shifting landscape for resource sharing and look for a set of services that will position UC for the future.

VDX is software managed and supported by CDL; it is deeply entwined with 2 other services developed and maintained by CDL. The first is PIR (Patron Initiated Request) and the second is the Request service. Any consideration of a replacement for VDX needs to be informed by the full set of services that are involved. The Project Team should engage with the CDL team responsible for these services to fully understand them and the role they play.

SAG 2 believes the time is right to form a Resource Sharing Project Team to look at our options for a replacement set of services for the following reasons:

- There is widespread dissatisfaction among the UC Libraries with VDX.
- VDX is being sunsetted; and it will be a lengthy process to identify a suitable suite of services as well as launch formal procurement processes
- New resource sharing services are emerging such as RapidILL, Relais, and others.
- The UC Libraries have new emerging service needs, among them Shared Print, and eBooks lending. This is not an exhaustive list.

AREAS TO CONSIDER

1. Understand the suite of services provided by CDL that are closely integrated with VDX – PIR and REQUEST). PIR and Request are also closely entwined with the discovery layer (currently, WorldCat Local) and subsequently entwined as well with campus ILS systems. This is an area that should be paid attention to, to avoid scope creep. If the Project Team finds it must address the discovery layer, it should report that to SAG 2 (or successor group) for guidance.
2. As background, the Project Team should refer to the environmental scan completed in 2013 by the Resource Sharing Committee and Interlibrary Loan Advisory Group.
(http://libraries.universityofcalifornia.edu/groups/files/ILL_Environmental_%20S can_May_2013.pdf

3. Survey the campuses to see what additional resource sharing tools they use, and which ones fill needs not met by VDX in order to identify a full set of requirements.
4. Consider UC wide ILL survey results from the ILL CKG to see if any desired features are expressed by our users. (need pointer when current report is made available, current target is late September, 2015)
5. Gather a list of requirements from both the systemwide and campus perspectives.
6. Perform an environmental scan of available Resource Sharing applications.
7. Review products that will provide a balance between systemwide and local needs and configuration.

DELIVERABLES

- Make a recommendation(s) for a new suite of Resource Sharing services. Please note that any recommendations that involve a purchase would go through Purchasing procedures, for example, RFI, RFPs or Sole Source Justification review.

TIMELINE

Team forms in September 2015, reviews charge and membership
Gathers requirements and performs environmental scan by Dec. 31, 2015
Evaluates products and make recommendation by March. 31, 2016

MEMBERSHIP

- CDL Product Manager, Resource Sharing – Caitlin Nelson
- CDL Technical consultant – Joe Ferrie
- Chair of ILL CKG (currently, Jenny Lee) Jenny Lee, Convenor
- 2 other ILL experts from different campuses
  - Judea D'Arnaud
  - Tara Gooden
- Public services librarian – Elizabeth Salmon
- SAG 2 liaison (or successor) - TBD