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## I-Share Users' Group Minutes for July 27, 2007

Consortium of Academic and Research Libraries in Illinois

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## I-Share Users' Group Meeting Minutes

July 27, 2007

CARLI Office

**Members Attending:** David Bell, Sarah Mc-Hone Chase, Xiaotian Chen, Keith Eiten, Tom Goetz, Stephanie Graves, Carlos Melian, Larissa Moebs, Carol Reid

**Members Absent:** Paula Garrett, Dallas Long

**CARLI Staff Attending:** Lorna Engels, Kristine Hammerstrand, Cathy Salika, Paige Weston

**Guests:** Susan Singleton, (Director, CARLI)

## Decisions:

- New team member's terms were decided as follows:
  - Keith Eiten 3 years
  - Paula Garrett 1 year
  - Dallas Long 1 year
  - Sarah McHone-Chase 3 years
  - Carol Reid 3 years
  - Stephen Smith 3 years
- New Vice-chair/Chair elect: Carlos Melian
- New Secretary: Carol Reid
- June 13, 2007 Minutes approved as amended
- Set dates (and venues) for upcoming meetings as follows:
  - August 24 10-3 CARLI office
  - September 28 10-3 CARLI office
  - October 25 11-3 (note time) tentatively Wheaton College, alternately CARLI office
  - November 30 10-3 CARLI office
  - December No meeting
  - January 24 10-3 conference call only
  - February 22 10-3 conference call only
  - March 17 10-3 tentatively Heartland CC, alternately CARLI office
  - April 25 10-3 CARLI office
  - May No meeting
  - June 6 10-3 CARLI office

## Discussion with Susan Singleton concerning the IUG charge:

- CARLI strategic planning process almost complete

- Emphasis on innovation, experimentation, flexibility and the future
- Looking at various next generation discovery tools (“front ends”)
  - University of Rochester’s Extensible Catalog project
  - Villanova University’s new open source product, VU Find
  - AquaBrowser
  - WorldCat Local
- CARLI staff will develop a proposed business plan focused on usability testing that will allow CARLI to quickly get student focused feedback through libraries that will partner with the consortium. This will also allow feedback from librarians in the field who have independent results to share.
- Fostering culture of change in CARLI by forming partnerships or collaborations with members beyond I-Share
- Clarification of Voyager funding for I-Share Libraries: there is an assessment that each institution currently pays that takes into account enrollment, database size, and usage
- Assurance that Universal Borrowing and patron’s My Account information critical in any new products considered
- Regarding usability testing, major concerns are with enhancements requiring programming staff resources

## **CARLI Board Report:**

- Approved the concept of preparing an RFP that could provide pricing for more than one commercial front-end system.
- The delivery RFP process is awaiting State budget resolution before going forward to completion
- The new strategic plan sets a goal of standardized UB loan periods within I-Share.
- The Immersion Institute went well and CARLI will announce next week its sponsorship of the first regional ACRL/ARL Scholarly Communication Institute which will be held in Chicago in December.

## **Team Reports:**

- Acquisitions & Serials Team:
  - Carlos Melian (remains as IUG liaison)
  - Meetings scheduled 3rd Fri of each month
  - Last meeting was mostly housekeeping, discussed quarterly conference calls (where CARLI members can call in to ask acquisitions/serials questions scheduled on 9/19) and Webinars for Electronic Resource Management Systems (ERMS) like Ex Libris’ Verde. Note: (ERMS) have been submitted to the Product and Services Vetting Committee (PSVC)
- Cataloging and Authority Control Team
  - Stephen Smith appointed IUG liaison
- Resource Sharing Team
  - Sarah McHone-Chase appointed IUG liaison
  - First meeting scheduled: Thursday, August 16, 2007
- Instruction Team
  - David Bell stepped aside for Stephanie Graves to become IUG liaison
  - First meeting scheduled: Friday, August 10, 2007

- OPAC Team
  - Tom Goetz remains as IUG liaison
  - Hilary Kraus remains as chair

Note: Liaison duties include attending team meetings and keeping them informed about what IUG is doing, and reporting the activities of the team back to IUG. Liaisons are not voting members of the team. Liaison appointments may be annually reviewed. CARLI staff also attends team meetings.

## CARLI Office report:

- Lincoln Trail Libraries System is hosting a Symposium on the Future of Integrated Library Systems on September 13-15. See <http://www.lincolntail.info/ilssymposium2007/intropage.html> for details
- All 6 new I-Share libraries are online
- UC rebuild is almost done
- I-Share now has passed 25 million bibliographic records in its 71 local databases
- Now 2 CARLI coordinators working remotely, Jennifer Masciadrelli and Jessica Gibson
- CARLI's 24 hour toll free support number has been available since July 2. No after hours calls have been logged in that time.

## Discussion:

- Mentoring program for forums
  - Goals: Relationship building and familiarization with terminology
  - Problems include: mentor/mentored not showing up to meeting, mentor didn't know expectations and abandoned mentored at lunch, matching them on site—how to meet? Also, was this type of meeting best way to discuss unfamiliar terminology or issues? Better during Q/A, lunch.
  - Suggested solutions: have mentor/mentored pair arrive half hour early (carpools/ distance traveled impacted by this), assign pair early and have email conversation before event, “lunch with newbie”, color coded badges, blog/wiki/podcasting.
- Actions:
- IUG will develop a proposal and discuss with Margaret Chambers (CARLI Communication Director) at future meeting;
- Tom Goetz will work on guidelines for email communication for mentors.
- Webcasting of workshops and forums
  - WIMBA is not designed for videoconferencing but may be appropriate for capturing some Forum or training presentations.
- PR for the teams and their activities/accomplishments; IUG will schedule a visit with Margaret Chambers to pursue this.
- Carlos shared the revised CARLI Forum Evaluation form. After further minor revisions, it will be used at future CARLI events/forums.
- CARLI plans to do the next Voyager upgrade in the December 2007-January 2008 timeframe. The upgrade will move I-Share from Voyager 6.1 to 6.5.2 or 6.5.3, depending on product release dates.

# Future Agenda Items

- Schedule a meeting with Margaret Chambers to discuss several issues, including PR for teams, Wiki/blog, etc. for new members (include terminology list)
- Analyzer
- Reports Forum