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I-Share Resource Sharing Team Minutes for September 19, 2007

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I-Share Resource Sharing Team Minutes

September 19, 2007

Present: Lynn Bierma, Susie Duncan (minutes), Lorna Engels, Mel Farrell, Peggy Glatthaar, Sherry Gogomadsen, Sarah McHone-Chase, Deborah Myers, Peggy Roth, Deborah Stevenson (chair), Candace Walter

Absent: Pat Woodworth

The meeting was called to order at 2:05 PM.

The minutes from August 16, 2007 were approved.

It was noted that Pat Woodworth hasn't been in attendance for awhile, Deb Stevenson will email her.

Old Business

Lynn and Deb are attending the CARLI chair meeting and will be giving a quick overview of the forum agenda.

Lynn reported that the ILLINET Code revision has been completed. It is being sent to Anne Craig and will be posted to the ISL website. The revised Interlibrary Loan Traffic Form will come out in Mid-January.

IUG LIAISON REPORT: (Sarah McHone-Chase) August 24, 2007 meeting.

- Margaret Chambers met with the group to discuss publicity and mentoring. She needs the various CARLI groups to give her content for the CARLI newsletters. She would like pictures of member libraries, comments, bullet points for the newsletter, and informed the team that the CARLI blog was available for posting items as well. IUG will send bulleted items to her at the end of each meeting, and suggests all teams do so as well.

-The Resource Sharing Team agreed to take time at the end of each meeting to decide on 1 or 2 things to share with Margaret.

- The mentoring program was discussed – how to match people up, defining the relationship, back-ups for no-shows. Special seating at forums, color coded name tags and matching people by institution size were considered. Responsibilities of the mentor would include lunching with the mentored. The Resource Sharing Team needs a final decision on the mentoring procedures/policies in order to post the registration for the November 14, 2007 forum.

The Acquisitions & Serials Team forum (“Get your Acq Together”) will be held November 29, 2007, and the Cataloging & Authority Control Team forum will be held at UIC on November 13, 2007.

CARLI REPORT: (Mel Farrell and Lorna Engels)

- CARLI has been exploring different discovery and retrieval tools, which libraries could use instead of WebVoyage. VUFind is an open source option which talks directly to the server. Some I-Share libraries have participated in a pilot program of WorldCat Local (a front end system). LTLS recently hosted a

symposium on the future of the ILS, where Evergreen—the software utilized by the Pines Consortium in Georgia--will soon have acquisition and serials modules) was demoed along with other software.

- CARLI is working with the Delivery Implementation Team to make the switch to Lanter in January 2008. Library directors should have received material regarding this, including an invitation to take a survey about their needs and requirements.

There was a question about libraries putting “Lanter” as their preferred shipping method on requests. Some libraries already use Lanter, and it could have been referencing that. Once CARLI makes the switch we will continue to refer to the delivery system as ILDS, not Lanter.

Several team members reported that it wasn’t unusual for them to receive requests via OCLC which could have been made via Voyager. Voyager’s promotion process allows it to promote requests to non-circulating copies in some instances. Libraries sometimes use OCLC in order to circumvent Voyager functionality when it doesn’t function the way they need it to.

Libraries will use the delivery bags we already have initially, but libraries will also start using zipper bags with windows that display the routing information. These bags are conducive to “stacking;” it will be easier to stack the books in this style bag and that the bags will be able to be stacked for shipping. The most exciting prospect is the 24 hour turn around time.

Libraries will need to make some changes, especially in regard to bagging and pickup. All libraries will be referred to by 3-letter codes (using pre-existing CARLI codes for libraries that already have them). Once books are bagged library staff will go into a web service to fill in some details and print shipping labels, as well as a manifest listing the number of bags.

Kris Hammerstrand will speak about the new system at the November forum. Workflow suggestions will be forthcoming. The I-Share Resource Team may be asked to create a best practices document.

- The Circ/ILL Policies wiki has been working well. 20+ libraries had modified their entries as of last week. The team has found it to be a wonderful resource.

[http://wiki.carli.illinois.edu/index.php/Circ/ILL_Policies: A Chart of I-Share Library Practices](http://wiki.carli.illinois.edu/index.php/Circ/ILL_Policies:_A_Chart_of_I-Share_Library_Practices)

FALL FORUM PLANNING

The team reviewed the draft agenda. After the Welcome and the CARLI Report Kris will speak about the new delivery system. She has been allotted 75 minutes to allow plenty of time for questions. We can break early for lunch if need be. The afternoon session will consist of Rebecca Butler’s copyright presentation.

Rebecca sent the team a list of questions. She can expect an audience of between 85-120 people. Some team members had brainstormed over email to come up with a list of areas they’d like to see covered:

- the “Basics”
- “fair use” defined
- copyright in regard to courses, reserves, ILL, multi-media
- help/guidelines for libraries creating their own copyright policies
- a copyright guide

Concern was expressed as CARLI would be unable to provide an honorarium. However, the forum is being

held at NIU so that she won't have travel expenses and CARLI will provide the copies for any handouts. Sarah will check with Rebecca to find out if this is acceptable.

It hasn't been decided yet if this forum will be available by phone. CARLI may use WIMBA to provide access, but they're not certain they'll be ready to do so in time for the forum.

The CARLI Forum Evaluation form has been revised in the hope of gathering more helpful information. The team will brainstorm for topics to list as choices for future forums. Mel will put together a list of past forum topics to use as a starting point. The team was reminded that there were problems last time because callers weren't allowed to phone in early. CARLI is aware of this, and if the forum is available by phone that will be addressed.

New Business

- At the August 16, 2007 meeting, Susan Singleton suggested several projects for the team:
 - Discover how many items end up with lost/unpaid status each year

We can get this information via Voyager reports, but it would be helpful to know what the information was wanted for – just a general idea of what's out there, or as a list for libraries to work from to invoice each other?

2002, when I-Share came up on Voyager, was suggested as a logical starting point, as the data would be most consistent from then on. Except for item status, the lost item information from previous systems didn't migrate as such, and should probably just be written off. But we could query to see what's out there. Also, do we want both system and library applied lost items? Institutions use these statuses differently, however the defining factor for our purpose here is that they will be both Lost AND attached to a UB record.

Mel and Lorna will ask Susan for more information.

- Look at ways to promote standardized loan time proposal

If libraries were able to break with the tradition of giving the same services to UB patrons as we give our own, and could have one loan period for local use, and another for UB, then standardization would be much more palatable. For example, if a library could give their own faculty whatever loan period they wanted, then they'd have less difficulty agreeing to a standard loan period for UBLong.

Also, mapping to UBReg and UBLong is inconsistent. Faculty are always UBLong; undergrads always UBReg; IL and SY are always UBIN, but other patron group mappings are up for grabs. The same patron may have different statuses with different schools, hence different loan periods. This will be even more apparent to patrons when we move to standardized loan periods. The team agreed to recommend keeping the Patron Groups of UBReg and UBLong and standardizing the policies for each.

- Look at policies, determine which are the "hardest sell"

Renewals/loan periods. These are tied together, generally speaking. Allowing libraries to profile their own patrons differently from the standard should make an agreement easier to reach.

Processing fees – many libraries don't charge. At least one institution had begun charging these fees specifically to modify patron behavior (away from allowing material to become "lost").

Suspensions work for some patrons, but others just wait to take care of things until they need to borrow something new. Perhaps there is no way to change some people's behavior.

Replacement charges – set amounts would be difficult, but giving a range within which prices should fall might be workable.

Fines – most libraries have turned to processing fees. Again, if they can continue to fine their own patrons it should be easier to get agreement on fining.

Develop best practices, or agreement on turn-around time in processing requests

We need to remind libraries to process callslips. Some libraries aren't processing them, they let the requests expire.

Items Deb will forward to Margaret: wiki, (Mel will also forward the comments she's received), standardization, new delivery service, November 14 Forum.

Next meeting (conference call) tentatively scheduled for October 24. The call-in number will be provided.

Meeting adjourned 3:34 PM.

Respectfully Submitted,
Susie Duncan