

11-12-2009

I-Share Resource Sharing Team Minutes for November 12, 2009

Consortium of Academic and Research Libraries in Illinois

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Recommended Citation

Consortium of Academic and Research Libraries in Illinois, "I-Share Resource Sharing Team Minutes for November 12, 2009" (2009).
I-Share Resource Sharing Team. Paper 28.
http://digitalcommons.carli.illinois.edu/iug_res/28

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CARLI Resource Sharing Conference Call – Minutes

Nov. 12, 2009

Committee Members: Deborah Campbell (Millikin University), Susie Duncan (University of Illinois at Urbana-Champaign), Li Fu (Chicago State University), Pam Greenlee (Olivet Nazarene University), Dallas Long (Illinois State University), Peggy Roth (Western Illinois University), Rachelle Stivers (Heartland Community College), Candace Walter (Southern Illinois University at Edwardsville)

IUG: Mary Burkee (IUG Liaison, University of Illinois Urbana-Champaign),

Belinda Cheek (North Central College), Nancy Laverdiere (Western Illinois University), Carlos Melian (Northeastern Illinois University), Stephen Smith (University of Illinois at Springfield)

CARLI Staff: Mel Farrell, Lorna Engels

Absent: Marilyn Clay (Oakton Community College)

CARLI Office Report / Annual CARLI Meeting (Mel / Dallas)

- New conference call system. Some time in Jan. 2010, a new system will be implemented. A caller will get a phone number **and a code**. Instead of an operator, a robot assistant will greet the caller. Note: don't hang up once you call in; otherwise, it'd be all messed up. Just say 'Hello' and stay on. The new system can hold 50+ people on call.
- Heads up for holiday schedules. Before Christmas, CARLI staff will be on call starting from Mon. Dec. 21. After Christmas, CARLI Office will be on reduced service. The office phone, the after hours support and CARLI online support will be monitored.
- Last week, CARLI's annual meeting was helpful and productive. From the Chairs Breakfast meeting:
 - A consensus was reached that is to build a stronger collaboration with all committees. Chairs can meet more than just annual meetings; and cataloging and acquisition can have a joint meeting, etc.
 - The idea of joint partnerships and joint forums was explored. Across the working groups and programs, topics of mutual interests; whoever chairs the resource sharing committee may chair other committees as well ...

From the general meeting:

- Good speakers on various topics.
- The contract between WebFeat and CARLI ends. More information is upcoming next year.
- Change in Bylaws. Will move from three tiered membership to two tiers In FY2011.
- Assessment structure will also change in FY2012
- Susan Singleton explained how members are selected. Some elected positions will be appointed. These changes were made in order to help library directors who are new to Illinois or CARLI.

IUG Report (Mary)

- IUG has had calls with the Instruction team and the ICAT team so far
- Cataloging Forum will be Dec. 2 and Dec. 3 – two days for four sessions. Registration deadline is Nov. 24. Details can be found at: <http://www.carli.illinois.edu/mem-serv/mem-train/register/091202wimba/>
- Reporting Interest Group is calling for presenters for the reports forum to be held in late January. It'll be four 90-minute webinars. Panelists for two panel discussions are encouraged to contact Cathy Salika, csalika@uillinois.edu. Please recommend someone you know.

Pros & Cons of Renewal from Due Date versus Date of Renewal (Dallas)

- For the UB matrices, I-Share suggested renewing from the original due date. Reasons are: UB's set of standards; reducing number of renewals; longest loan period is predictable, regardless of the date when the patron renews.
- Library can decide their own local matrix settings
- Currently there is a wide variety in the policies for loan periods and renewals. For example, some libraries have a loan period of four weeks; allow 1-2 renewals; some four renewals.
- Question was asked about a certain scenario where patrons check two items on the same date, but the due dates are different. Is it because the callslips were processed on the different dates, or due to different book type, or because of the global matrix? Library will send examples to the CARLI Office when they experience this situation again.

Talk moved to the topic of billing practices and the difficulty of setting policies

- Block patron at home library or set different penalties
- Because of the different policies, any changes will have to come from the Board if the consortium is to seek uniformity in billing matters.
- At this time, no action has been taken by the Board.
- Budgetary process. For lost books, oftentimes the home libraries have to absorb the cost of those lost by the borrowing library patrons. Heartland, for example, with a small budget, has a local account to pay other school lost books. So, you have to bill other lost items in order to budget back to your school's account again

Follow-up on Fall Forum (Mel)

- 50% evaluation forms back from the attendees
- Complaints are about the location/the hosting school not prepared for us.
- Content was good. Speakers were efficient. The summary on the afternoon roundtable discussion has been sent out. As always, people enjoyed the afternoon's session because they had the opportunity to participate in the discussion
- Future topics: support topics, liaison responsibilities, billing procedures, best practices
- How can we have all the libraries follow the best practices?
 - Road map for best practices?
 - A Webinar format for more attendance?
 - To institutionalize best practices: make them as guidelines or policies?
 - Request the Board to speak to library directors to ensure that their libraries carry out the best practices?
- Best practices are/can be posted to the CARLI's website. However, CARLI's site is hard to navigate – it's not user friendly for new people Mel will work on some ideas for navigating users to best practices documentation on the CARLI website
- Liaison charges/responsibilities can be found on the CARLI's website. Anyone can call or email CARLI if they have a question – it doesn't have to be the liaison

Check-in with Users Group Members

- *Question 1: Is there something that your team has thought about doing before but did not have the resources (time, people, money, materials) to do?*
 - More authority to do things
 - Loan period for UB
 - Best practices vs. the authority to enforce them at the consortial level
 - Difficulties and issues need to go to higher levels: for example – billing, how should we deal with it, and whose responsibilities to pay bills?
 - Our recommendations go to IUG before IUG takes them to Board, but sometimes, it's hard to proceed and the process is not efficient..
 - Many libraries don't follow the best practices, which makes other libraries' staff very frustrated. Due to budget and staffing, some libraries might not be able to follow the best practices, and some libraries need support and understanding from their library directors. In some libraries, best practices are not followed because the director says no. In other libraries, there's little support from the top/boss. Maybe a survey can help with specific questionnaires like: what prevents your library from following the best practices? How to follow the best practices?
 - IUG: Yet, who should be taking/getting the survey? What are the resource sharing best practices? Have CARLI directors seen all kinds of best practices including the resource sharing ones? If some libraries agree to follow and others don't, how to get frustration out of those that follow? There's currently no consortium policy yet from CARLI, but different level policies can be further explored.
 - IUG: Compile a list of issues – however difficult they are, and IUG can take them to Susan or whoever concerned, even to get the higher level CARLI staff involved, e.g. legal council
 - IUG: This will be an agenda item for the next IUG meeting.
- *Question 2: Is there another way of doing things besides a monthly meeting or forum?*
 - Resource Sharing group call has been very interactive. Seems like a good way to communicate, in our opinion
 - The format of the meetings is good so far
 - More communication opportunities in the future: webinar, web delivered, etc.?
- *Question 3: What services would your team like to be able to provide to patrons that the next ILS could enable?*
 - More efficient billing for distance learners
 - Be able to use Voyager's Bursar Transfer for UB transactions
 - Be able to pay online

- Take credit card
 - ILL integration with other departments on campus
 - More integration with the campus financial systems
 - Future ILL should see all the records of one patron's account
 - Without using social security number, it should be possible to issue invoices/bills to users who are in arrears.
 - An online fee-paying utility that would allow users to direct payments to individual libraries during the same session.
 - Confusing names to students: I-share, Resource Sharing, interlibrary loan, OCLC, in-state borrowing, article requests, etc. – what's the difference?
 - From the circulation client, the patron's home library staff should be able to see all the items checked out by the home patron in the home library's database no matter which site the item was picked up/checked out
 - A search box for requests ????
 - Patrons should be able to utilize a library's contact information directly from their accounts. This could be accomplished by links to each library's information or website. The Library Name that divides the items charged on the page could serve as this hotlink.
 - The display in my account should be ordered differently, e.g. by due date, by contact information, or simply customizable
- *Question 4: Any questions for or about IUG?*
 - How can we better support distance education? Some libraries have a well established distance education, but some don't. There should be a joint meeting with acquisition, circulation, resource sharing, etc. with IUG on this issue.
 - *Question 5: What mechanisms of communication would the team prefer with IUG?*
 - Have less formal meetings that can encourage good discussions.
 - Have team chair meetings more often.
 - Join in the conference call once every semester
 - More meetings can be called/scheduled if we see a need
 - More structured concept
 - Policy issues

- More resource sharing issues
- **Fines of "\$4.99 or Less!" (Mel)**
 - The proposal needs to go to IUG
 - Get it established as a policy by the Board
 - Mel will develop specs and bring to our next meeting
 - Some libraries won't waive fines until the item is back [in the case where the fine is levied at renewal
 - How do you want it to work?
 - Scripts to run on schedule?
- **Next Meeting Date:**
 - December 10th, 2009, 2 pm – 4 pm
- **Conference call adjourned at 3:54pm.**