Interlibrary Loan Discussion Group Minutes

Saturday, May 3, 2008; 1:00-2:00 pm

Moderator: Jon Evans

In Attendance: Jon Evans, Danial Elliot, Linda Seckelson, Günter Waibel, Sam Duncan, Clare Vasquez, Kevin Madill, Karen Bucky, Alba Fernández-Keys, Amy Ballmer, Melanie Emerson, Cecilia Chin, Deborah Barlow Smedstad, Dennis Massie, Mary Wassermann, Louis Adrean, Tracy Serur, Kathryn Phillips, Chia-Chun Shih

The agenda included the following.

I. Welcome & Introductions – Jon Evans (MFA, Houston)
II. OCLC and SHARES updates –
    Dennis Massie (OCLC) and Karen Bucky (Clark Art Institute)
    A. SHARES Executive Group update
    B. Ongoing OCLC transition issues
    C. OCLC Programs and Research update
    D. Zero dollars transactions
    E. SHARES wrapping & packaging issues
        1. Standards for returnables
        2. Green packaging initiative
III. Streamlining successes or other tips for WCRS and ILLiad
IV. Recommendations for software improvements
V. New or recently discovered sources
VI. Other business
VII. Adjourn

I. Welcome and Introductions led by Jon Evans.

II A. Dennis Massie and Karen Bucky provided an update of the SEG (Shares Executive Group). Dennis reminded the group that many museum libraries are part of SHARES and in order to be eligible, the library must be part of the RLG program.
Karen named the members of SEG and proceeded to describe two sets of projects currently in progress:

1. Proposed tasks
2. Working groups

1. Proposed tasks:
   
a) Review and update vision statement for SEG.
b) Create SHARES marketing material. This could be a great document to provide to institutional administrators.
c) Review pricing structure. Currently there are three categories of pricing. Group felt these should be updated to take into account international lending.
d) Survey the membership. Find out what SHARES provides and what members are looking for.

2. Working groups:
   There are five working groups with at least one SEG member in each.

   a) Rethinking onsite access.
   Members of SHARES libraries to be allowed use of other SHARES libraries. The group is trying to better the end-user experience and thinking how to publicize the idea.
b) Looking at SHARES documentation.
   This group is looking at those documents that need to be edited, changed, restored, or updated. One example is the packaging guidelines document.
c) Establish benchmarks for high performance lenders.
d) Analyze borrowing requests that are not being filled. Which types of materials are difficult to borrow and if there are other sources for those materials.
e) Sharing expertise among ILL librarians.

Dennis added that because SHARES is formed by a diverse group of libraries, it is a good place to try out new projects and ideas. One example of this is the RAPID project. This is a sharing program where libraries make certain portions of their collections available within 24 hours. They have created their own union list and are currently expanding. Perhaps there is a possibility of creating a museum group.

II B. Dennis Massie is interested in hearing how OCLC is working for those libraries that have already transitioned from RLG. There have been questions regarding which holdings have already been uploaded to OCLC. A document containing record counts was provided.

OCLC did not allow a “Museum Library” type. This feature will soon be available.
II. OCLC does not have a way to provide reports on zero dollar transactions. If museums are interested in these, OCLC is willing to create a way to obtain statistics.

II E. Karen Bucky discussed the green packaging idea which was prompted by a message to the ILL list. She thinks this might be a good project for the SEG.

Jon Evans suggested a contest in which design students create mailers that conform to green practices.

Karen is interested in creating a best practices document that relates to shipping and packaging. It might begin with finding out what people are currently doing and then expand to include greener ways to request materials (better to request from nearby institutions to minimize the impact of transportation), packaging that is re-usable, dealing with shippers who are more environmentally conscious, etc.

IV. Jon Evans reminded the group that with the ILL manager software one could communicate directly with other lenders and borrowers via an internal messaging function. This feature is currently not available in WorldCat Resource Sharing. Several members of the group thought this might be a beneficial feature.

Clare Vasquez commented on the issue of auto-deflection and asked whether there is a way for requesters to identify potentially deflected requests prior to submission. This feature is currently not available. Karen Bucky added that she would like to enable or disable specific OCLC symbols. Currently this only works for groups.

Mary Wassermann shared that she is having difficulty tracking materials when they become overdue. She would like a feature that allows the user to obtain a list of overdue transactions. Dennis will find out if it is possible to have an overdue alert feature as well as to search for items with due dates within a particular date range.

Jon Evans commented that labeling and printing of bands has worked well for him.

V. Jon addressed the challenge of finding and borrowing videos. He noted that on occasion he has found that material can be found on YouTube.

VI. Jon Evans inquired as to whether anyone had produced internal ILL guidelines for users at their institution. No one had done so. Jon agreed to share a draft of guidelines he is creating via the listserv. The group agreed to provide feedback.
Respectfully submitted by
Alba Fernández-Keys