



ASSOCIATION OF SOUTHEASTERN RESEARCH LIBRARIES

Conference Call Notes

Kudzu-Operations Team

August 2, 2016 – 11am ET / 10am Central Time

Participants:

Auburn – Pam Whaley, Fran Judkins
Clemson – Erika Andersen, Renna Redd
East Carolina – William Gee
George Mason – Jessica Bowdoin
U-Alabama – Cornelia Davis, Gaby Marcks
UAB – Eddie Luster
UAB/ListerHill – Joann Garrison
U-Kentucky – Courtney Taulbee
U-Louisville – Andrew Huff
U-Memphis – Gail Barton
U-Miami – John Sandoval

U-Miss – Victoria Thames
UNC Charlotte – Ann Davis
UNC Greensboro – Cathy Griffith, Gaylor Callahan, Chanda Jackson, and Pat Kelly
U-South Carolina – Amie Freeman
U-Tenn – Kathleen Bailey, Nicole Carney
Vanderbilt – Jim Toplon
VCU – Shirley Thomas
Wake Forest – James Harper
ASERL – John Burger, Cheryle Cole-Bennett

Absent: College of William & Mary, Georgia Tech, Tulane

AGENDA

Welcome / Roll Call – John Burger called the meeting to order and took roll at 11:03am.

Review of Year-End Statistics – see <http://www.aserl.org/programs/wrlc-ill/ill-stats/>.

John Burger announced the year-end statistics have been posted to the ASERL website. He noted a slight decline in OCLC lending over the past year, while RAPID activity has increased. John also noted that there are some imbalances in borrowing/lending reciprocity. This did not seem to be of concern, as no comments or questions were expressed.

Discussion: Possible OCLC Migration from ILLiad to WorldShare?

John talked about the upcoming migration of ILLiad from a local client-based system to OCLC's WorldShare platform. James Harper (Wake Forest) noted the current migration involves moving ILLiad to the Worldshare platform, not the dissolution of ILLiad as a product – at least not as far as we know. OCLC has convened an advisory committee to assist with the project. Margaret Ellingsworth (Emory) and Geneva Holliday (UNC-Chapel Hill) serve on this committee – can they provide additional

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information? John will contact them, but noted that Non-Disclosure Agreements required by OCLC will likely prevent committee members from discussing the project.

The projected timeline for the migration is also unknown. John noted that the Big 10 Academic Alliance (formerly CIC) has sent a letter to OCLC leadership asking for additional information about the plans for future developments of ILLiad. John will attempt to get more information from OCLC on what is planned and will distribute further updates through the list. There were no additional questions/concerns.

Convene review of Reciprocal ILL Policy

John Burger noted that 'baseline' ASERL reciprocal resource sharing agreement has not been substantively reviewed since 2003 – see <http://www.aserl.org/programs/ill/reciprocal-agreement/> for current version. When it was originally drafted, this policy was intentionally vague with few requirements to maximize participation. More recently there have been requests to consider more standardization, such as standardized loan periods, renewal policies, etc. Other suggestions from the participants included overdue fines, standards for turn-around time, and the possibility of borrowing/lending various media types beyond print resources. The group also noted that ALA had recently reviewed the overarching agreements which govern the national program.

James Harper (Wake Forest) and Jessica Bowdoin (George Mason) volunteered to assist with this review. John will also solicit participation via the ASERL-ILL email list.

Can we adopt IDS Logic toolkit?

During the Spring, a small taskforce -- Pam Whaley (Auburn), Suzanne Massey (UAB) and John Sandoval (U-Miami) -- investigated the various services and tools available from the IDS Project as a means of improving ILL services within Kudzu. They recommend the Kudzu group – and possibly all of ASERL – consider adopting the IDS Logic toolkit. See attached overview of the IDS Logic tool kit; cost is \$750/year per library.

John Burger will arrange for a webinar to demonstrate the functionalities of the IDS Logic toolkit. If there is consensus, ideally we would try to implement the toolkit around the first of the calendar year.

Question: Would the use of IDS Logic be required for all Kudzu libraries? Or would it be recommended as a best practice, rather than a requirement? John expressed some concern in managing multiple variations of participation in the expanding Kudzu-related offerings - who is only following the basic Kudzu requirements, who uses Kudzu + IDS, plus who uses the courier, etc. There was some concern about the cost of the toolkit in light of decreasing ILL activities. East Carolina has developed some home-grown system add-ons for ILLiad which they might be able to share with others. The group agreed that more discussion is needed. John will arrange for the IDS webinar as a next step.

Update – Occam’s Reader Implementation

This pilot project began July 1, involving 24 ASERL and WRLC libraries. The service allows libraries to share all or part of e-book content that is stored on an intermediate server, with the e-content becoming unusable after a certain length of time.

The use of Occam’s Reader is dependent on having appropriate content-sharing provisions in licenses for e-resources. When the program began, GWLA enjoyed a very good working relationship with Springer and secured these provisions easily. The sale of Springer to Nature Publishing Group has resulted in a more restrictive view of content sharing; while GWLA libraries can still share Springer content, many others have been unable to secure such permissions.

The participating ASERL/WRLC libraries view the pilot in a spirit of experimentation, with hope that expanding the Occam’s Reader participant base will help persuade publishers to allow more favorable licensing terms. A few Kudzu libraries reported about their early experiences using Occam’s Reader, including some hiccups in configuring the system. In particular, Clemson is unable to indicate they are unable to fill requests within the Occam’s Reader system; they are turning down these requests manually, one-by-one. Clemson asked participants to seek other libraries to fill Occam’s Reader requests for the time being.

Update – Beta Test of Texas Tech Shipping Portal

John reported that two ASERL libraries (University of Kentucky & University of South Carolina) will pilot test the use of a new service created by staff at Texas Tech University, the same developers of Occam’s Reader. The service allows libraries to monitor multiple shipping services/vendors within a single web interface, including USPS, UPS/FedEx, and (hopefully) private courier services. The pilot will run through the Fall semester, with a public roll-out possible for Spring 2017. John noted that Lanter Delivery Systems is unable to commit to providing their parcel tracking data for use by this program at this time.

Update – Fair Use Principles for Resource Sharing Checklist

Librarians at Mississippi State University have completed the drafting of a new checklist for applying Fair Use principles within resource sharing operations. This work was done with partial support from an ASERL mini-grant to Mississippi State. The content was reviewed by an expert review panel, including both RS staff and copyright/legal experts. This material will undergo one last review by ASERL’s staff and Board; the final version should be released within the next few weeks.

Update – Lanter Delivery Portal

The Lanter package tracking portal was implemented in September of last year. Spotty service issues continue. John is negotiating with Lanter to develop an enhancement which would flag items that do not process through their system within appropriate timeframes, so service issues can be resolved proactively by Lanter staff. Until that enhancement is in place, RS staff should continue to report lost/missing/damaged items to Lanter ASAP, with a copy to John Burger so he can remain aware of service issues.

It was also noted that Memphis, Tulane, and Vanderbilt are receiving service four days per week due to Lanter process changes.

- Vanderbilt has recently installed a lockbox to receive Lanter deliveries after hours, but it is rather small – it cannot hold all incoming/outgoing items. James Harper noted they selected their own lockbox which Lanter purchased for them – he will share that information.
- John Burger is negotiating with Lanter about credits for Memphis and Tulane due to the decrease in service. He will report back to them with results.
- Memphis may be able to install a lockbox to resolve the scheduling issue – Gail Barton will investigate.
- Kathleen Bailey (U-Tennessee) noted they had purchased their own lockbox several years ago – this should have been paid for by Lanter. At this point, Kathleen feels this happened too long ago to try to obtain a refund – but we will monitor future developments to be sure others do not pay for lockboxes unnecessarily.

Likes/Dislikes re: New Pink Bags for Lanter Courier?

John solicited feedback on the new, water-resistant courier bags.

- The grommets are self-defeating in regards to waterproofing. We will seek to relocate or remove grommets.
- Participants like the bags generally, and want more of them. John will seek a bid for an additional purchase.
- Users liked the size – is a happy medium in size, and helps to ensure users do not overload the bags and exceed the \$250 loss liability limit.
- The stick-on address labels that are created by the parcel tracking system are troublesome. Some libraries are affixing them to the clear plastic windows rather than onto cards inside the see-through pockets. Others noted the pockets have become cloudy/unusable due to sticky residue from the stick-on labels. Some libraries are using Goo-Gone to remove the residue from the windows – may be unpleasant, but seems to work well.
- Users were reminded to use plastic grocery bags or Ziploc bags to help with waterproofing. John will purchase more Ziploc bags and ship directly to participating libraries to help ensure this continues.

Open Mic / Other Announcements?

Renna Redd (Clemson) noted they will soon post a job announcement due to a staff departure; John Burger encouraged her to share the posting via the Kudzu-Ops and ASERL-ILL lists.

Adjournment

With no further comments or announcements, John Burger adjourned the call at 11:54am