

Public Services Planning Committee of the SUL
Quarterly Report to the Council of State University Libraries (Draft)
Submitted by: Dawn Smith, PSPC Chair, 2009
March 5, 2009

The PSPC has had one teleconference call meeting (February 23, 2009) since the face to face meeting, in December, 2008. The January meeting was postponed because the committee lacked a quorum due to a scheduling conflict with ALA midwinter conference. A monthly teleconference meeting schedule has been established through December, 2009.

Dawn Smith, FAU, assumed the committee chair for calendar year, 2009. Barbara Stites, FGCU, serves as vice-chair, chair-elect for 2010. Douglas Low, has replaced Caroline Thompson as the UWF representative to the PSPC.

The membership listing and other information on committee website has been requested to be updated:

<http://csul.net/pspc/pamem.shtml>

Action Item

1. The ILL/Circ committee recommends that in order to save resources those libraries wishing to purchase ILLiad should consortially join together to purchase as one unit through the ILL/Circ subcommittee with the assistance of FCLA. It is recommended that an invitation be extended to ICUF institutions to join the consortial purchase. (see attached Florida Academics with ILLiad)

Information Items

This report includes discussions and activities from PSPC and PSPC subcommittees from January through March, 2009

1. Public Services Planning Committee

- At the December face to face meeting, committee members discussed new ideas, projects and changes in their libraries during the year, changes to the PSPC Action plan, the security issue that occurred at Florida State University and the security measures that were implemented.
- FCLA project relations were discussed.
- Updated the Action Chart with a new Status column (see attached)*
- Asked committee members for their top 3 priorities for objectives/projects this year.

2. ILL/Circulation Subcommittee – Michelle Foss (outgoing chair) Marilyn Burke(incoming chair)

This subcommittee had a December face to face meeting and conference call January 30, 2009.

At the December face to face meeting discussions covered:

- Proposal that the ILL/Circ committees be combined – proposal passed.
- Election of new chair: Marilyn S. Burke (USF)
- Discussion of TBLC Delivery – TBLC would like the ILL/Circ committee members to help them monitor the service on a regular basis. Kristine Shrauger will act as liaison because she is on the task force to monitor and improve delivery service.
- Discussion of SUL Libraries switching from Ariel to Odyssey. Ariel/Infotrieve—merged three years ago and since that merger the Ariel contact person is no longer available. Ariel will not be further developed and the code will not be sold to any other company— the program will still be sold, but not supported and not updated. Many SULs are slowly switching to ILLiad Odyssey. Committee members would like any SUL to send to the ILL listserv the decision made to switch to Odyssey only/Odyssey main.
- ILL/Circ subcommittee is in the process of collecting SULs loan period information to assist in setting standards for unmediated borrowing once implemented.

January meeting discussion (full report is attached):

- Combining the Circulation and ILL SUL subcommittee mailing list and members recommending a new name for the committee.
 - Recommended to FCLA that patron records that have been inactive for 5 years or more be purged from ALEPH in response to a query from Jennifer Kunz, FCLA.
 - Discussion of TBLC Delivery – Committee agreed to eliminate barcodes.
 - Twelve vendors currently offer courier service in Florida. February 15 is the deadline for these vendors to submit their RFPs, March 15 is the deadline for the Delivery Committee to decide which courier to adopt, and April 15 is when the contract for courier service will be awarded.
 - Kristine Shrauger reported that eliminating courier service during the week between Christmas and New Year's saved \$12,000. This offset high gas costs incurred during the summer.
3. Information Literacy Subcommittee - Jacque Druash, Chair
This subcommittee has not met.
4. OPAC Subcommittee - Melinda Gottesman, Chair
- Committee met on Thursday, February 12, 2009 (full report is attached):
 - This past quarter, the SUL OPAC Subcommittee implemented the ability to Browse by Call Number, a feature much-requested by both library staff and patrons alike. The subcommittee continues to follow the list of recommendations outlined by last year's OPAC Visioning Summit, and is currently working on the ability for patrons to use the OPAC to find not only books and library physically-held materials, but articles from journals as well. This will be a huge leap forward for all the SUL's bringing us from an OPAC to a true Information Discovery Tool.
 - The OPAC Subcommittee also established a liaison with the U Borrow Taskforce, since the outcome of that taskforce will greatly affect the look and use of the OPAC; we look forward to aiding the Taskforce on how their decisions can be incorporated into the OPAC.
 - CRL records took up a great deal of development time from FCLA. The records have been loaded into the OPAC, but only two schools (UF and USF) have found CRL records to be of enough value to add to their local catalogs. The other SUL's are content with having the records available in the Union Catalog only.
 - The 'send call number via text messaging' feature has proved to be very popular, with some patrons given high praise in the 'feedback' section of the OPAC.
 - In the coming year the OPAC Subcommittee hopes to continue to proceed with the Visioning Summit priority list. Future priorities include a 'recommender service' based on subject headings – (i.e. if you like this book, you might also like...), links to Book Reviews, and a re-purposing of the goals and mission of the OPAC subcommittee into an Information Discovery Subcommittee to better represent the function of a next-generation information discovery system like MANGO

Respectfully submitted,

Dawn Smith
Chair, Public Services Planning Committee
March 5, 2009

Draft Minutes – Circ/ILL Subcommittee

January 30, 2009

Convened at 11:00

Attending:

Merilyn Burke (USF - chair), Caroline Thompson (UWF), Britt McGowan for Lisandra Carmichael (UWF), Doug Hasty (FIU), Barbara Stites (FGCU), Dan Schoonover (FSU), Teresa Van Dyke (FAU), Diana Schmidt (USF), Marcus Kilman (UCF), Steve Matthew (FAU), Kristine Shrauger (UCF), Priscilla Henry (FAMU), Ed Foster (New College), Barbara Edell (New College), Linda Butson (UF Health), Michelle Foss (UF), Bridgett Turnipseed (FSU), Velma Smith (FSU), Patricia Simonds (FSU-Law), Jennifer Kuntz (FCLA), Rob Waltner (UNF), Laurel Crump (UNF)

1. UBorrow Report

- a. A small UBorrow Subcommittee chaired by Julia Zimmerman is working on the UBorrow project. The subcommittee has scheduled a face to face meeting at FCLA on February 12.
- b. Julia Zimmerman forwarded a questionnaire to the Subcommittee for review before sending to institutions identified as involved in Unmediated Borrowing
- c. Jennifer Kuntz reported that FCLA is working on its two priorities, setting up ALEPH ILL and preparing for the ALEPH 19 upgrade.
- d. Kristine Shrauger requested that FCLA add an ILLiad request button in ALEPH.
- e. FCLA is identifying the different types of request issues and addressing them in the ALEPH and ILLiad environments.
- f. Kristine Shrauger reported that after participating in a webinar featuring SUNY IDS, USF, FAU, and UCF began testing the unmediated borrowing feature in ILLiad. These three institutions are also beta testing unmediated article borrowing in ILLiad.
- g. Kristine, Jennifer, and Merilyn clarified that the purpose of the Unmediated Borrowing Task Force was to explore the feasibility of unmediated borrowing in the SUL with available software. The Director's Subcommittee supports unmediated borrowing as it was presented by the Unmediated Task Force and is considering the implementation timeline and the service's costs and benefits.

2. Delivery Committee

- a. Kristine asked if we needed bar codes or not. We agreed to eliminate them.
- b. Twelve vendors currently offer courier service in Florida. February 15 is the deadline for these vendors to submit their RFPs, March 15 is the deadline for the Delivery Committee to decide which courier to adopt, and April 15 is when the contract for courier service will be awarded.
- c. Kristine reported that eliminating courier service during the week between Christmas and New Year's saved \$12,000. This offset high gas costs incurred during the summer.
- d. In negotiations with courier services, the Delivery Committee will consider who will bear the responsibility for lost or damaged books (the courier service or the library).

3. Purging Inactive Patron Records

- a. Jennifer asked the group if it was comfortable with purging inactive patron records from ALEPH. These would be patron records with no outstanding fines or obligations.
- b. Unless one of its members has a concern that is posted by February 27, the Circ/ILL Subcommittee recommends that patron records that have been inactive for 5 years or more be purged from ALEPH.

4. Our Joined Subcommittee

- a. Merilyn would like to combine the Circulation and ILL SUL Subcommittee mailing list and would like us to recommend a name for our group.

5. ILLiad Conference

- a. There is an International ILLiad Conference < <https://www.atlas-sys.com/conference/>> in Virginia Beach in March.
 - b. If you are attending, please identify the sessions you are going to participate in and let Doug Hasty know if you would like to meet during the conference for an informal get together.
 - c. Although the sessions will be available online following the conference, attendees may want to share information with the Circ/ILL Subcommittee (several members will not be there).
6. Laurel Crump from UNF asked the group for feedback about displaying new books
 - a. USF – eliminated the new book display area because it was difficult for patrons to find
 - b. UWF – has had a new book display area for years on the first floor near the elevators and it doesn't seem to have caused any problems
 - c. FGCU – new books are displayed outside Starbucks and there are no issues with it
 - d. FAU – media and new books are displayed in the library's lobby. They are rotated often enough that once they are in the catalog, they are already shelved in the book stacks
 - e. FSU – it could be a library size issue because there are slight problems with the new book display at Strozier but none at the smaller Dirac Library
 7. The FLA Preconference is on May 5. The agenda will be available in a couple of weeks. Doug Hasty will send us information.
 8. FGCU is negotiating for a Head of Access Services and would like some recommendations from our group about what title should be used to successfully recruit this position (Doug Hasty mentioned that FIU is currently searching for a Resource Sharing Librarian).
 9. Merilyn will establish a schedule for our meetings. She would like to keep them on Friday mornings for consistency.

We adjourned at 11:45

Unmediated Borrowing Questionnaire (Draft)

The State University System of Florida is investigating unmediated borrowing systems, hoping to develop and implement a system similar to the one used by your consortium.

Input from your library about staffing and workflow implications of unmediated borrowing systems would be extremely useful. A brief survey is available at:

Responses received by Wednesday, February 10th will be especially appreciated. Thanks very much for your assistance.

Approximately how many books were **loaned by** your library last year through the consortial unmediated borrowing system? _____

How many books **were borrowed** by your library in the same time period through the unmediated borrowing system?

What is the approximate size of your collection (in volumes) _____

How many FTE staff are required to support unmediated borrowing?

- Librarians
- Classified staff
- Student workers

Where in the organization does the unmediated borrowing unit reside?

- Interlibrary loan
- Circulation
- Other Explain:

Has the system affected workflow or volume in the Interlibrary Loan unit?

- Yes Explain:
- No

What other changes have occurred in staffing and/or organizational structure in your library as a result of implementing unmediated borrowing?

If you were implementing the system today, would you have done anything differently?

Minutes

In attendance

Jeannette Cox	FAMU
Bruce Barron	FAU
Anna Carlin	FGCU
George Pearson	FIU
Nancy Spaid	NC
Melinda Gottesman	UCF
Colleen Seale	UF
Jessica de Perio Wittman	UF Law
Marina Salcedo	UF Health
Barbara Tuck	UNF
Susan Silver	USF
Randy Polo	USF Med
Doug Low	UWF
TSPC Liaisons	Betsy Simpson, Elaine Winske
FCLA --	Josh Greben, Pam Mydock, Ned Stewart, Gerald Snyder

***** = permanent agenda items**

1. Approval of minutes from the last meeting ***
2. Approval of agenda with additions
3. Roll Call *** – Melinda Gottesman
4. FCLA Update:
 - a. Josh reported that FCLA has been working on unmediated borrowing and CRL records that are CSUL priorities.
 - b. They have also been working on the Z39.50 interface in Mango so there can be a joint CCLA and SUL union catalog.
 - c. The project to search for articles in the catalog using Metalib is still in the early stages.
 - d. They have also been fixing various bugs reported by committee members.
5. Business:
 - a. Marina's 3 items – protocol for meeting cancellation, relooking at the spreadsheet, CSUL.
 1. Melinda will send out a reminder the Monday before a scheduled meeting so people have a chance to think more about what they want to discuss during the upcoming conference call. If no one has anything to discuss, Melinda can cancel the meeting.
 2. The committee will go over the spreadsheet again and discuss issues, explaining better what each is and possibly voting again on priorities. Members wanted more information about "more like this" listed on the spreadsheet. Melinda will send out information about BibTips for the committee to look at before the next meeting.
 3. There are no CSUL representatives on subcommittees.
 - b. Anna's 2 items – RSS feeds and folder issues.
This has already been fixed.
6. Maintenance:

- a. GovDocs Issues – Barbara T.
This was discussed at length. Government documents URLs are not library-specific. All URLs from all libraries show in everyone’s records. This can be very confusing when there are several, but the advantage is that if a library corrects a URL or adds a URL when one is missing, then everyone benefits by that work. FCLA is going to try to fix it so that exact duplicate links will not show, but the records will continue to show links from all libraries. Melinda will talk to PSPC to find out about the MARCIVE initiative. This may help the problem.
 - b. Titles in the folder be linked? – Barbara T.
FCLA thinks this can be done and will do it.
7. Features:
- a. OPAC de-prioritized due to UBorrow and Single Bib, but Article Searching and Book Reviews remain OPAC’s next priority. --
 - b. Mobile-support – Jean –
Josh talked about what this would entail. It will be added to the spreadsheet and the priority will be discussed in the next round of issues.
8. Discussion:
- a. New Name/Mission for Committee? –
The Committee discussed the possibility of lobbying for a new committee name to be more descriptive of its work. Members not only work with FCLA on the design of the OPAC and the way the OPAC works but also find and suggest new technologies and information discovery tools. Barbara will send out the current committee charge for people to look over for the next meeting.
9. TSPC Update –
TSPC has been working on finalizing the regeneration of indexes for each of the schools. FIU was the first to go live. FCLA is in the process of scheduling the others. Everyone is getting ready for the Aleph Version 19 upgrade. TSPC is finalizing its action plan to present to CSUL. Three of their objectives apply to Endeca access or display.
- They are discussing a plan for centralized e-records for government documents and are working in a support capacity for UBorrow and the centralized storage facility. One of their objectives is identifying and recommending what they believe needs to be in Endeca and sharing it with the OPAC Subcommittee. There is discussion about the lack of a cross reference structure. There is a Metadata Subcommittee spending time looking at digitized information and how it can be accessed in the catalog and in the facets. It is material outside of the PALMM records.
- Technical services librarians continue to respond to problems reported by the OPAC Subcommittee (and others) so changes can be made to maintain an overall clean look in the catalog.
- The question was asked if the browse search was searching only the home catalog. It is. It was reported that corporate authors are now included in the author browse.
10. UBorrow Update - -- Josh said we should keep up with this because it will impact the look of Mango. We should look at the test catalog and have some input into the look and wording of the UBorrow button.
 11. A question was asked about usability studies. Melinda reported that it is a subcommittee of the OPAC Subcommittee and is an ongoing group. Only four schools have IRB approval to do testing.
- 12. Next Meeting – March 12th at noon**

Endeca Issues are now in a Google Docs spreadsheet –
<http://tinyurl.com/6jafb9> (for OPAC members)
<http://tinyurl.com/3nesyg> (for Non-Committee Members)

Endeca/MANGO Resources:
 Blog:

<https://sblogs.fcla.edu/index.php/endecca>)

RSS Change Log

<http://catalog.fcla.edu/svnlog.xml>

Respectfully submitted,

Barbara Tuck

Audio of this and previous meetings available here. http://www.unf.edu/library/guides/endecca_podcasts.html